

Simplified Questionnaire

For Canadian Returns

Date ____/____/____

Client Information

Taxpayer	Spouse
Full Name _____	Full Name _____
Preferred Name _____	Preferred Name _____
Legal Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	Legal Gender <input type="checkbox"/> Male <input type="checkbox"/> Female
Disabled _____	Disabled _____
Date Of Birth _____	Date Of Birth _____
SIN#/TIN# _____	SIN#/TIN# _____
Select all that apply:	Select all that apply:
<input type="checkbox"/> Canadian Citizen	<input type="checkbox"/> Canadian Citizen
<input type="checkbox"/> Canadian Permanent Resident	<input type="checkbox"/> Canadian Permanent Resident
<input type="checkbox"/> Other _____	<input type="checkbox"/> Other _____
Email Address _____	Email Address _____
Phone Number _____	Phone Number _____
Time Zone _____	Time Zone _____

Address _____

City _____ Province/State _____ Postal/Zip Code _____

*** For any questions which you are unsure of the answer, please enter a question mark. ***

Marital Status as of Dec 31st:

☐ Single ☐ Married ☐ Common-Law ☐ Separated ☐ Divorced ☐ Widowed

Changed this year? ☐ Yes ☐ No If yes, Date of Change _____

Please answer all questions on the following page.

For any questions which you are unsure of the answer, please enter a question mark.

Taxpayer	Spouse
Are you claiming any dependents? ___ Yes ___ No Childcare Expenses? ___ Yes Education Expenses? ___ Yes Disabled? ___ Yes Have you moved in the last calendar year? ___ Yes ___ No If yes, was it to a new state/province/country? ___ Yes ___ No If yes, prior state/province/country _____ Did you change where/how you perform your work due to Covid or other reasons? ___ Yes ___ No Are you working from home? ___ Yes ___ No Are you self-employed? ___ Yes ___ No Is the business incorporated? ___ Yes ___ No If yes, in what country? _____ Is it a partnership? ___ Yes ___ No If yes, in what country? _____ Do you own rental property? ___ Yes ___ No If yes, where is the property located? ___ USA ___ Canada ___ Other _____ Did you earn income from accounts or assets (stocks/mutual funds/ETFs) outside of Canada? ___ Yes ___ No Did you sell any property in the tax year (real estate, stock/bonds/mutual funds, etc.) ? ___ Yes ___ No Did you purchase, sell, mine, trade, own or acquire crypto/virtual currency? ___ Yes ___ No Do you own a retirement/pension/education savings plan outside of Canada? ___ Yes ___ No If yes, do you own any Roth IRA account? ___ Yes ___ No Did you previously file a Roth IRA election with CRA? ___ Yes ___ No Did you make any instalment payments to CRA or RQ during the year? ___ Yes ___ No If yes, please upload proof of payment(s) to your client portal, Do you own any foreign property (cash/assets/real estate) located outside of Canada or any foreign stocks, mutual funds or ETFs? (see T1135 Quick Sheet) ? ___ Yes ___ No If yes, did the total combined COST of these properties exceed \$100,000.00CAD? ___ Yes ___ No Additional Comments:	Are you claiming any dependents? ___ Yes ___ No Childcare Expenses? ___ Yes Education Expenses? ___ Yes Disabled? ___ Yes Have you moved in the last calendar year? ___ Yes ___ No If yes, was it to a new state/province/country? ___ Yes ___ No If yes, prior state/province/country _____ Did you change where/how you perform your work due to Covid or other reasons? ___ Yes ___ No Are you working from home? ___ Yes ___ No Are you self-employed? ___ Yes ___ No Is the business incorporated? ___ Yes ___ No If yes, in what country? _____ Is it a partnership? ___ Yes ___ No If yes, in what country? _____ Do you own rental property? ___ Yes ___ No If yes, where is the property located? ___ USA ___ Canada ___ Other _____ Did you earn income from accounts or assets (stocks/mutual funds/ETFs) outside of Canada? ___ Yes ___ No Did you sell any property in the tax year (real estate, stock/bonds/mutual funds, etc.) ? ___ Yes ___ No Did you purchase, sell, mine, trade, own or acquire crypto/virtual currency? ___ Yes ___ No Do you own a retirement/pension/education savings plan outside of Canada? ___ Yes ___ No If yes, do you own any Roth IRA account? ___ Yes ___ No Did you previously file a Roth IRA election with CRA? ___ Yes ___ No Did you make any instalment payments to CRA or RQ during the year? ___ Yes ___ No If yes, please upload proof of payment(s) to your client portal, Do you own any foreign property (cash/assets/real estate) located outside of Canada or any foreign stocks, mutual funds or ETFs? (see T1135 Quick Sheet) ? ___ Yes ___ No If yes, did the total combined COST of these properties exceed \$100,000.00CAD? ___ Yes ___ No Additional Comments