

Please review each section carefully and provide the required details. We **require that all clients submit this information annually—even if there have been no changes to your situation**. This allows us to remain fully compliant with industry regulations and continue delivering the highest level of service.

TAXPAYER

1. Full Name: _____
2. Preferred Name: _____
3. Legal Gender: ☐ Male ☐ Female
4. Are you disabled? ☐ Yes ☐ No
5. Date of Birth: _____
6. SIN#/TIN# (per Service Canada): _____
7. Select all that apply:
☐ Canadian Citizen
☐ Canadian Permanent Resident
☐ Other _____
8. Email Address: _____
9. Phone Number: _____
- If AET not preparing – Net Income (Line 23600): _____

SPOUSE

- Full Name: _____
- Preferred Name: _____
- Legal Gender: ☐ Male ☐ Female
- Are you disabled? ☐ Yes ☐ No
- Date of Birth: _____
- SIN#/TIN# (per Service Canada): _____
- Select all that apply:
☐ Canadian Citizen
☐ Canadian Permanent Resident
☐ Other _____
- Email Address: _____
- Phone Number: _____
- If AET not preparing – Net Income (Line 23600): _____

10. Address: _____ City: _____
Province/State: _____ Postal/Zip Code: _____ Country: _____
11. Marital Status as of Dec 31st: ☐ Single ☐ Married ☐ Common-Law ☐ Separated ☐ Divorced ☐ Widowed
12. Did your marital status change in the year? ☐ Yes ☐ No If yes, date of change? _____

Please answer all questions on the following pages.

For any questions which you are unsure of the answer, **please select unsure**

	TAXPAYER			SPOUSE		
	Yes	No	Unsure	Yes	No	Unsure
1. Number of children/dependents?						
2. Are any disabled?						
3. <i>Select all that apply:</i> Childcare Expenses						
Education Expenses						
Medical Expenses						
4. Have you moved in the last calendar year?						
a. If yes, was it to a new state/province/country?						
b. If yes, what was the prior state/province/country?						
5. Are you working from home?						
6. Are you self-employed?						
a. Is the business incorporated?						
b. In what country?						
c. Is it a partnership?						
d. In what country?						
7. Do you own rental property?						
a. Where is the rental property located?						
8. Did you earn income from accounts/assets (stocks/mutual funds/ETFs) outside of Canada?						

Simplified Questionnaire

For Canadian Returns

	TAXPAYER			SPOUSE		
	Yes	No	Unsure	Yes	No	Unsure
9. Did you sell any property in the tax year (real estate, stock/bonds/mutual funds, etc.)?						
10. Did you purchase, sell, mine, trade, own or acquire crypto/virtual currency?						
11. Do you own a retirement/pension/education savings plan outside of Canada?						
a. If yes, do you own any Roth IRA account?						
b. Did you previously file a Roth IRA election with CRA?						
12. Did you make any instalment payments to CRA or RQ during the year? <i>Please upload proof of payment(s) to your client portal.</i>						
13. Do you own any foreign property (i.e. cash, assets, real estate) or any foreign stocks, mutual funds or ETFs located outside of Canada (see T1135 Quicksheet)?						
a. If yes, did the total combined COST of these properties exceed \$100,000.00CAD?						
14. Do you authorize direct deposit with CRA?						
15. If yes, please provide the following:						
Bank Name: _____	Bank Name: _____					
Transit Number: _____	Transit Number: _____					
Institution Number: _____	Institution Number: _____					
Account Number: _____	Account Number: _____					