

Date _____

BASIC INFORMATION

TAXPAYER

SPOUSE

1. Full Name: _____
2. Preferred Name: _____
3. Legal Gender: ☐ Male ☐ Female
4. Are you disabled? ☐ Yes ☐ No
5. Date of Birth: _____
6. Name on SIN card: _____
7. Social Insurance Number: _____
8. Select all that apply:
 - ☐ Canadian Citizen
 - ☐ Canadian Permanent Resident
 - ☐ US Citizen
 - ☐ Green Card Holder
 - ☐ Other _____
9. Occupation: _____
10. Email Address: _____
11. Phone Number: _____
12. Do you need to set up Direct Deposit with the CRA? ☐ Yes ☐ No
If yes, please provide the following (CRA does not save this information year over year.):
- Institution** (3 digits): _____
- Branch** (5 digits): _____
- Account Number:** _____
13. Can CRA share your contact information with Elections Canada? ☐ Yes ☐ No
14. Did you make any payments to the CRA (not including tax that was withheld on an income slip)?
☐ Yes ☐ No
15. Preferred Contact Method: _____ Time Zone: _____

- Full Name: _____
- Preferred Name: _____
- Legal Gender: ☐ Male ☐ Female
- Are you disabled? ☐ Yes ☐ No
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- Name on SIN card: _____
- Social Insurance Number: _____
- Select all that apply:
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 - ☐ Canadian Permanent Resident
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- Do you need to set up Direct Deposit with the CRA? ☐ Yes ☐ No
If yes, please provide the following (CRA does not save this information year over year.):
- Institution** (3 digits): _____
- Branch** (5 digits): _____
- Account Number:** _____
- Can CRA share your contact information with Elections Canada? ☐ Yes ☐ No
- Did you make any payments to the CRA (not including tax that was withheld on an income slip)?
☐ Yes ☐ No
- Time Zone: _____

16. Mailing Address: _____ City: _____
 Province/State: _____ Postal/Zip Code: _____ Country: _____
17. Residing Address (if different): _____ City: _____
 Province/State: _____ Postal/Zip Code: _____ Country: _____
18. Marital Status as of Dec 31st: ☐ Single ☐ Married ☐ Common-Law ☐ Separated ☐ Divorced ☐ Widowed
19. 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**

TAX FILING & RESIDENCY INFORMATION**TAXPAYER**

1. Year of last Canadian return filed: _____
Please provide AET with a copy
2. Type of Return filed:
☐ T1
☐ Part Year
☐ Non-Resident
☐ Other _____
3. Province of Residence on December 31 of
2022 _____
2023 _____
2024 _____
2025 _____
4. Have you provided support to anyone who is disabled? ☐ Yes ☐ No

SPOUSE

- Year of last Canadian return filed: _____
Please provide AET with a copy
- Type of Return filed:
☐ T1
☐ Part Year
☐ Non-Resident
☐ Other _____
- Province of Residence on December 31 of
2022 _____
2023 _____
2024 _____
2025 _____
- Have you provided support to anyone who is disabled? ☐ Yes ☐ No

DEPENDENT INFORMATION

Please use additional pages as needed. **NOTE:** Dependents may not be limited to just children

DEPENDENT ONE

1. Full Name: _____
2. Are they disabled? Yes ☐ No ☐
3. Relationship: _____
4. Date of Birth: _____
5. Name on SIN Card: _____
6. Social Insurance No: _____
7. Email Address: _____
8. Net Income \$: _____
9. Select all that apply:
☐ Childcare Expenses
☐ Medical Expenses
☐ Education Expenses
☐ Disability-Related Expenses
☐ Other _____
10. Additional Information: _____

DEPENDENT TWO

- Full Name: _____
- Are they disabled? Yes ☐ No ☐
- Relationship: _____
- Date of Birth: _____
- Name on SIN Card: _____
- Social Insurance No: _____
- Email Address: _____
- Net Income \$: _____
- Select all that apply:
☐ Childcare Expenses
☐ Medical Expenses
☐ Education Expenses
☐ Disability-Related Expenses
☐ Other _____
- Additional Information: _____

ADDITIONAL INFORMATION

Please complete applicable years - mark with an x all that apply

Income	TAXPAYER		SPOUSE	
	2024	2025	2024	2025
1. Employment income (wages)	☐	☐	☐	☐
2. Earned tips or casual income	☐	☐	☐	☐
3. Received foreign Income	☐	☐	☐	☐
4. Earned business/professional Income (Self-employed)	☐	☐	☐	☐
5. Received Interest, Dividends, or other Investment Income (T3/T5)	☐	☐	☐	☐
6. RRSP/RPP Withdrawal	☐	☐	☐	☐
7. Own a Rental Property	☐	☐	☐	☐
8. Received Pension/Social Security Income (T4A, CPP, OAS, etc.)	☐	☐	☐	☐
9. Received (Un)Employment Insurance	☐	☐	☐	☐
10. Purchased, sold, mined, traded, or owned crypto/virtual currency	☐	☐	☐	☐
11. Sold Shares/Stocks during the year	☐	☐	☐	☐
12. Received Scholarship/Bursary	☐	☐	☐	☐
13. Received Payments from an RESP/RDSP	☐	☐	☐	☐
14. Received support payments during the year (child or spousal/alimony)	☐	☐	☐	☐
15. Received Royalty Income	☐	☐	☐	☐
Deductions/Credits (Receipts must be available upon request by CRA)				
1. Made RRSP Contributions	☐	☐	☐	☐
2. Participated in a Home Buyer's Plan or Lifelong Learning Plan	☐	☐	☐	☐
3. Made FHSP Contributions	☐	☐	☐	☐
4. Purchased a new Home During the Year	☐	☐	☐	☐
5. Incurred Moving Expenses	☐	☐	☐	☐
6. Required to Make Support Payments (Child or Spousal/Alimony)	☐	☐	☐	☐
7. Northern Resident (Zone A or B)	☐	☐	☐	☐
8. Paid Student Loan Interest	☐	☐	☐	☐
9. Incurred Medical Expenses	☐	☐	☐	☐
10. Transferring credits from Spouse/Dependent	☐	☐	☐	☐
11. Made Charitable Contributions	☐	☐	☐	☐
12. Made Federal or Provincial Political Contributions	☐	☐	☐	☐
13. Incurred Employment Expenses	☐	☐	☐	☐
14. Did any Family Member Attend Post-Secondary Education?	☐	☐	☐	☐
15. Incurred Legal Fees (Relating to Income)	☐	☐	☐	☐

SPECIALIZED REPORTING FOR CANADA – FOREIGN ACCOUNTS/ASSETS

	TAXPAYER			SPOUSE		
	Yes	No	Unsure	Yes	No	Unsure
Foreign Income Verification Statement (T1135)						
1. Do you own any specified property* outside of Canada costing more than \$100,000 CAD?	☐	☐	☐	☐	☐	☐
2. Did the combined cost of ALL foreign specified property exceed \$100,000CAD?	☐	☐	☐	☐	☐	☐
3. Have you received a letter from the CRA requesting you to file form T1135?	☐	☐	☐	☐	☐	☐
Note: Specified Foreign Property includes chequing/savings/investment accounts, certain retirement plans, life insurance policies, stocks/mutual funds, real estate rentals, etc. located outside Canada						
Trusts (T1141/T1142)						
1. Do you own or contribute to a retirement/pension plan located outside of Canada?	☐	☐	☐	☐	☐	☐
a. If yes, is the plan sponsored by an employer?	☐	☐	☐	☐	☐	☐
2. Do you own any units of a non-Canadian mutual fund trust?	☐	☐	☐	☐	☐	☐
3. Do you own, contribute to or are the beneficiary of a non-Canadian:						
a. Deferred Profit-Sharing Plan (DPSP)?	☐	☐	☐	☐	☐	☐
b. Employer Stock Option Plan (ESOP)	☐	☐	☐	☐	☐	☐
c. Any other Trust not located in Canada?	☐	☐	☐	☐	☐	☐
4. Do you own a ROTH IRA?	☐	☐	☐	☐	☐	☐
a. Did you elect to defer the taxation of income earned in the account?	☐	☐	☐	☐	☐	☐
b. Have you inherited a retirement/pension plan, or trust located outside of Canada?	☐	☐	☐	☐	☐	☐
5. Have you ever filed Form T1141 or T1142?	☐	☐	☐	☐	☐	☐
6. Have you received a letter from the CRA requesting you file form T1141 or T1142	☐	☐	☐	☐	☐	☐
Foreign Affiliates						
1. Have you previously filed Form T1134?	☐	☐	☐	☐	☐	☐
2. Have you previously received a letter from CRA requesting you file Form T1134?	☐	☐	☐	☐	☐	☐
3. Do you own/have interest in 10% or more of a non-Canadian Corporation/Partnership or a US LLC?*	☐	☐	☐	☐	☐	☐
*If yes, please attach an income statement, balance sheet, and a copy of the last return (or Form K1) filed in respect of the applicable Corporation/Partnership.						