

Simplified Questionnaire

For Canadian Returns

Name: _____ SIN#/TIN# _____

Address: _____ Date of Birth _____
(mm/dd/yyyy)

City: _____ Province: _____ Postal/Zip Code: _____

Main phone: _____ Cellular Phone: _____ Time Zone _____

Alternate phone: _____ Email: _____

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

Citizenship: Check all that apply

Canadian Citizen _____ Canadian Permanent Resident _____ Other _____

What was the last year you filed a Canadian tax return? _____ Form T1135? _____

Marital Status on December 31st:

Single (never married) _____ Common-law _____ Married _____ Separated _____ Divorced _____ Widowed _____

Did your marital status change at any time during the last tax year? _____

Please answer all questions :

1. Are you claiming any dependents? _____ If yes, how many? _____
2. Have you moved in the last calendar year? _____
If yes, did you move outside of your country of residence? _____
3. Are you self-employed? _____ If yes, is the business incorporated? _____ A partnership? _____
Is your spouse self-employed? _____ If yes, is the business incorporated? _____ A partnership? _____
4. Do you own rental property? _____
If yes, where is the property located? US _____ CAN _____ Other _____
5. Did you sell any property in the tax year (real estate, stock/bonds/mutual funds, etc.)? _____
6. **Did you purchase, sell, mine, trade or own crypto/virtual currency?** _____
7. Do you own/use online gaming/gambling accounts? _____
8. Do you own a retirement/pension plan outside of Canada? _____
If yes, do you own any Roth Accounts? _____
9. Are you the executor of an estate? _____
10. Do you own any property (cash, stocks, trusts, etc.) outside of Canada? _____
If yes, did the total aggregate **COST** of these properties exceed \$100,000.00 CAD? _____



Client Name: _____

Additional Comments:

Slips and Information Sent to AET - Summary: