

Full Questionnaire

For Canadian Returns

Date ____/____/____

Client Information

Taxpayer	Spouse
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Full Name _____

Preferred Name _____

Legal Gender Male Female

Disabled _____

Date Of Birth _____

Social Insurance Number _____

Name on SIN Card _____

Select all that apply:

Canadian Citizen

US Citizen

Green Card Holder

Other _____

Can CRA share your contact information with Elections Canada? Yes No

Occupation _____

Email Address _____

Phone Number _____

Full Name _____

Preferred Name _____

Legal Gender Male Female

Disabled _____

Date Of Birth _____

Social Insurance Number _____

Name on SIN Card _____

Select all that apply:

Canadian Citizen

US Citizen

Green Card Holder

Other _____

Can CRA share your contact information with Elections Canada? Yes No

Occupation _____

Email Address _____

Phone Number _____

Mailing Address _____

City _____ State/Province _____ Zip/Postal Code _____

Residing Address (If different) _____

City _____ State/Province _____ Zip/Postal Code _____

Preferred Contact Method _____ Preferred Days/Times _____ Time Zone _____

*** 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 _____

NOTE: Dependents may not be limited to just children

Dependent 1	Dependent 2
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Full Name _____
 Relationship _____
 Date Of Birth _____
 Social Insurance Number _____
 Name on SIN Card _____
 Email Address _____
 Net Income \$ _____

Full Name _____
 Relationship _____
 Date Of Birth _____
 Social Insurance Number _____
 Name on SIN Card _____
 Email Address _____
 Net Income \$ _____

Select all that apply:
 Childcare Expenses
 Medical Expenses
 Education Expenses
 Disabled
 Other _____

Select all that apply:
 Childcare Expenses
 Medical Expenses
 Education Expenses
 Disabled
 Other _____

Additional Information

Additional Information

Dependent 3	Dependent 4
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Full Name _____
 Relationship _____
 Date Of Birth _____
 Social Insurance Number _____
 Name on SIN Card _____
 Email Address _____
 Net Income \$ _____

Full Name _____
 Relationship _____
 Date Of Birth _____
 Social Insurance Number _____
 Name on SIN Card _____
 Email Address _____
 Net Income \$ _____

Select all that apply:
 Childcare Expenses
 Medical Expenses
 Education Expenses
 Disabled
 Other _____

Select all that apply:
 Childcare Expenses
 Medical Expenses
 Education Expenses
 Disabled
 Other _____

Additional Information

Additional Information

Tax Returns and Other Information

Complete the next pages for your individual situation.

Canadian Returns – *Please provide a copy*

Taxpayer	Spouse
Year of last Canadian return filed? _____	Year of last Canadian return filed? _____
Type of Return? <input type="checkbox"/> T1 <input type="checkbox"/> Part Year <input type="checkbox"/> Non-Resident <input type="checkbox"/> Other _____	Type of Return? <input type="checkbox"/> T1 <input type="checkbox"/> Part Year <input type="checkbox"/> Non-Resident <input type="checkbox"/> Other _____
Province of Residence on December 31 of 2020 _____ 2021 _____ 2022 _____ 2023 _____	Province of Residence on December 31 of 2020 _____ 2021 _____ 2022 _____ 2023 _____
Have you provided support to anyone who is disabled? <input type="checkbox"/> Yes <input type="checkbox"/> No	Have you provided support to anyone who is disabled? <input type="checkbox"/> Yes <input type="checkbox"/> No

Canadian Returns - Additional Information

Please complete applicable years – check all that apply.

	TAXPAYER		SPOUSE	
	2022	2023	2022	2023
Income				
Employment income (wages)				
Earned tips or casual income				
Received foreign Income				
Earned business/professional Income (Self-employed)				
Received Interest, Dividends, or other Investment Income (T3/T5)				
RRSP/RPP Withdrawal				
Own a Rental Property				
Received Pension/Social Security Income (T4A, CPP, OAS, etc.)				
Received Employment Insurance				
Purchased, sold, mined, traded, or owned crypto/virtual currency				
Sold Shares/Stocks During the Year				
Received Scholarship/Bursary				
Received Payments from an RESP/RDSP				
Received Support Payments During the Year (Child or Spousal)				
Received Royalty Income				

	TAXPAYER		SPOUSE	
	2022	2023	2022	2023
Deductions (Receipts must be available upon request by CRA)				
Made RRSP Contributions				
Participated in a Home Buyer's Plan or Lifelong Learning Plan				
Purchased a new Home During the Year				
Deductions continued	2022	2023	2022	2023
Incurred Moving Expenses				
Required to Make Support Payments (Child or Spousal)				
Northern Resident (Zone A or B)				
Paid Student Loan Interest				
Incurred Medical Expenses				
Paid for Public Transportation				
Made Charitable Contributions				
Made Federal or Provincial Political Contributions				
Incurred Employment Expenses				
Did any Family Member Attend Post-Secondary Education?				
Incurred Legal Fees (Relating to Income)				
Payments	2022	2023	2022	2023
Made installment payments to CRA? (not including tax that was withheld on an income slip)				

SPECIALIZED REPORTING FOR CANADA – FOREIGN ACCOUNTS/ASSETS

	TAX PAYER			SPOUSE		
	YES	NO	NOT SURE	YES	NO	NOT SURE
Foreign Income Verification Statement (T1135)						
Do you own any specified property* outside of Canada costing more than \$100,000 CAD?						
Did the combined cost of ALL foreign specified property exceed \$100,000CAD?						
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, etc. located outside Canada						

	TAX PAYER			SPOUSE		
	YES	NO	NOT SURE	YES	NO	NOT SURE
Trusts (T1141/T1142)						
Do you own or contribute to a retirement/pension plan located outside of Canada?						
If yes, is the plan sponsored by an employer?						
Do you own any units of a mutual fund trust, not located in Canada?						
Do you own, contribute to or are the beneficiary of a non-Canadian:						
Deferred Profit-Sharing Plan (DPSP)?						
Employer Stock Option Plan (ESOP)						
Any other Trust not located in Canada?						
Do you own a ROTH IRA?						
Did you elect to defer the taxation of income earned in the account?						
Have you inherited a retirement/pension plan, or trust located outside of Canada?						
Have you ever filed Form T1141 or T1142?						
Have you received a letter from the CRA requesting you file form T1141 or T1142						
Other	YES	NO	NOT SURE	YES	NO	NOT SURE
Have you previously filed Form T1134?						
Have you previously received a letter from CRA requesting you file Form T1134?						
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.						