

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