

QUESTIONNAIRE

One per couple

PLEASE FILL OUT AND PROVIDE WITH INFORMATION for 2023 INCOME TAX RETURN

	YOU	SPOUSE (if applicable)	
First & Last Name(s)	_____	_____	
Telephone # (for CRA)	_____	_____	
Cell # (for communication with mac's tax)	_____	_____	
Email for communication with mac's tax	_____	_____	
Preferred communication method to receive annual correspondence from mac's tax		Email	_____
		Mail	_____
Preferred communication method for current tax return		Email	_____
		Phone	_____
			Best time to call? _____
How much did you pay in 2023 for Rent or Property Tax (January to December) for your Principal Residence?		Rent	\$ _____
		Property Tax	\$ _____

Subsidized rent should not be entered.

No Change **New information**

Current address	_____
Marital Status on December 31	_____
Children under 19 living with you	_____

	YOU		SPOUSE (if applicable)	
	No Change	New information	No Change	New information
Direct Deposit information for tax refunds and credits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*If new account, please provide Void Cheque or Direct Deposit printout from your bank				
	No	Yes	No	Yes
Foreign Investments & Property at cost over \$100,000	<input type="checkbox"/>	_____		
Sale of Principal Residence in 2023	<input type="checkbox"/>	_____		
Disability	<input type="checkbox"/>	_____		
Opened First Home Savings Account (FHSA)	<input type="checkbox"/>	_____		

* Completed tax return(s) will be provided in **ONE** of the following formats (please mark your choice):

- PRINTED hard copy available for pick up in person, **or**
 PDF electronic copy sent to you by email

* **Multiple formats or mail** options are available at additional charge (please mark your choice):

- Printed **and** PDF copies (add \$25 plus HST per return)
 Mailed return by XPRESSPOST (add \$45 - \$55 plus HST)

Notes and other important information to discuss:

