

# QUESTIONNAIRE - NEW CLIENTS

Please fill out for each taxpayer separately and each year separately.

- FOR WHICH YEAR ARE YOU FILING A TAX RETURN? \_\_\_\_\_

- SOCIAL INSURANCE NUMBER \_\_\_\_\_

- FIRST & LAST NAME(S) \_\_\_\_\_

- DATE OF BIRTH \_\_\_\_\_

- CURRENT ADDRESS \_\_\_\_\_

- TELEPHONE # \_\_\_\_\_

- EMAIL ADDRESS (for communication with mac's tax) \_\_\_\_\_

- RENT or PROPERTY TAX (paid for principal residence) \_\_\_\_\_

- MARITAL STATUS AT DECEMBER 31 OF A TAX YEAR \_\_\_\_\_

- \*IF MARITAL STATUS CHANGED DURING THE YEAR *Date of change:* \_\_\_\_\_ *Previous status:* \_\_\_\_\_

- \*IF SPOUSAL/COMMON LAW'S TAX RETURN IS/WAS FILED SEPARATELY please provide his/her *Name:* \_\_\_\_\_ *Date of Birth:* \_\_\_\_\_  
*SIN:* \_\_\_\_\_ *Net Income (line 23600 of tax return):* \_\_\_\_\_

- CHILDREN UNDER 19 & UNDER 25, IF DISABLED THAT LIVE WITH YOU (Please provide Names and Dates of Birth) \_\_\_\_\_  
\_\_\_\_\_

- ARE YOU A CANADIAN CITIZEN?	Yes	No
- IF YES, do you want to provide your info to Elections Canada?	Yes	No
- IMMIGRATED OR SWITCHED PROVINCES DURING TAX YEAR?	Yes	No
- ARE YOU CURRENTLY IN BANKRUPTCY STATUS?	Yes	No
- DID YOU OWN A FOREIGN PROPERTY (Securities, Real Estate) WITH A TOTAL COST OVER \$100,000 DURING TAX YEAR?	Yes	No
- DID YOU SELL YOUR PRINCIPAL RESIDENCE DURING TAX YEAR?	Yes	No
- DO YOU HAVE A FOREIGN INCOME (PENSION, EMPLOYMENT)?	Yes	No
- ARE YOU SELF-EMPLOYED?	Yes	No
- ARE YOU CLAIMING DISABILITY FOR SELF?	Yes	No
- ARE YOU CLAIMING DISABILITY TRANSFER FROM A DEPENDANT?	Yes	No
- ARE YOU CLAIMING CANADA CAREGIVER AMOUNT FOR OTHER INFIRM DEPENDANT(S) AGE 18 OR OLDER?	Yes	No
- OPENED FIRST HOME SAVINGS ACCOUNT (FHSA)	Yes	No

- DIRECT DEPOSIT INFO (for refunds and credits) \_\_\_\_\_  
Already set up, no change required  
NEW (please provide Void Cheque or Direct Deposit Information)  
Not set up, no change required

- OPTIONS TO RECEIVE COMPLETED TAX RETURN (payment with cash, debit, cheque, e-transfer) \_\_\_\_\_  
**PRINTED COPY** for pick up in person  
**PDF FILE (ELECTRONIC COPY)** sent by email  
**BOTH PRINTED & PDF COPIES** (additional charge \$25 plus HST)  
**MAILED RETURN by XPRESSPOST** (additional charge \$25 plus HST)

- NOTES and other important information: \_\_\_\_\_  
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