

QUESTIONNAIRE

One per couple

PLEASE FILL OUT AND PROVIDE WITH INFORMATION for 2025 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 2025 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

Yes

No

Yes

Foreign Investments & Property at cost
over \$100,000

Sale of Principal Residence in 2025

Disability

Opened First Home Savings Account (FHSA)

* 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

PDF electronic copy sent to you by email

Printed and PDF copies (add \$29 plus HST per return)

Mailed printed copy by XPRESSPOST (add \$49 - \$59 plus HST)

Notes and other important information to discuss:
