

QUESTIONNAIRE

One per couple

PLEASE FILL OUT AND PROVIDE WITH INFORMATION for 2025 INCOME TAX RETURN

YOU

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

Rent \$

(January to December) for your Principal Residence?

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:
