

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 (DD-MM-YYYY)

- 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

Name:

Date of Birth:

IS/WAS FILED SEPARATELY please provide his/her

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

Date:

- 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

- OPTIONS TO RECEIVE COMPLETED TAX RETURN

(payment with cash, cheque, debit, Master Card,

Visa, Interac e-Transfer)

PRINTED COPY for pick up in person

PDF FILE (ELECTRONIC COPY) sent by email

BOTH PRINTED & PDF COPIES (additional charge \$29 plus HST)

MAILED RETURN by XPRESSPOST (additional charge \$49-\$59 plus HST)

- NOTES and other important information:
