

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 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 _____ 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:

