

PERSONAL INCOME TAX QUESTIONNAIRE

Name: _____

Address: Street _____

City, Province _____ Postal Code _____

Telephone _____ Cell _____ E-mail _____

Date of Birth: MM \ DD \ YYYY _____ Social Insurance Number: _____

Marital Status: ☐ Single ☐ Married ☐ Separated ☐ Divorced ☐ Widowed ☐ Common-Law

If changed in 2024, note date: _____

Spouse or common-law partner information.

Name: _____

Date of Birth: _____

Social Security Number: _____

Did you dispose of a principal residence in 2024?

(If yes provide the sales price of disposition and the year of original purchase) _____

Are you a Canadian Citizen? _____

Did you hold any foreign property during 2024 with an aggregate cost greater than \$100,000?

(If yes provide details including real estate, foreign bank deposit, and shares in foreign corporations, etc.)

Dependent information:

Name	Birth Date	SIN	Relationship
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Sole proprietorship information:

Business number: _____

Type of Business: _____

HST Period (If applicable): _____

What documents do I need to bring for my income tax return?

☐ **T4, T4A, T3, T3, T4AP, T4OAS, T4RSP slips**

☐ **Medical expenses**

* Dental, medical exams, prescriptions, glasses

☐ **Donation receipts**

☐ **Union receipts**

☐ **RRSP receipts**

☐ **School receipts and tuition fees paid**

☐ **Rent receipts* OR property tax paid**

* With landlord's name, amount paid and how many months lived at that address for the year

☐ **Interest paid on loans for investing**

☐ **If a first-time home buyer**

* Acquisition date and address