

PERSONAL TAX QUESTIONNAIRE

Name: _____ Tax Year: _____

1) **IF THERE HAVE BEEN ANY CHANGES IN YOUR PERSONAL INFORMATION** since your last tax filing, please complete the area below:

New address including postal code:

Telephone: Home _____ Cell _____ Work _____

Email Address (Please provide only if we don't already have) _____

Change in Marital Status. If yes, please circle: Married / Common-Law / Divorced / Separated / Widowed

Date of change: _____

New dependents:

Child (please provide name & date of birth) _____

Disabled Parent (please provide name, date of birth and date they moved in with you) _____

- 2) Are you a Canadian Citizen? Yes _____ No _____
- Do you have a U.S. tax filing requirement? Yes _____ No _____
- 3) Do you authorize Canada Revenue Agency (CRA) to provide your name, address and date of birth to Elections Canada for the National Register of Electors? Yes _____ No _____
- 4) Did you own or hold specified foreign property (such as investments, real estate (*NOT personal use property*) or loans with a total cost of more than \$100,000 CDN at any time during the year (see the T1135 Instructions for a detailed list)? Yes _____ No _____
- Unsure _____
- (If you are unsure, please complete the Foreign Reporting Checklist)*
- 5) Did you Sell or Dispose of real estate property? Yes _____ No _____

Signature Date

MISSING INFORMATION AND NOTES

Date Received _____ P/Y Fee _____