

# PERSONAL TAX QUESTIONNAIRE

Name: \_\_\_\_\_ Tax Year: \_\_\_\_\_

1) **IF THERE HAS BEEN ANY CHANGE 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 dependants:**

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 or change the use of property from personal to income producing or vice versa during the year? Yes \_\_\_\_\_ No \_\_\_\_\_

\_\_\_\_\_  
Signature Date

## MISSING INFORMATION AND NOTES

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date Received \_\_\_\_\_ P/Y fee \_\_\_\_\_