

GEORGE & SABBADIN, CPA'S
PERSONAL TAX QUESTIONNAIRE

Name: _____ Tax Year: _____

1) **IF THERE HAVE BEEN ANY CHANGES IN YOUR PERSONAL INFORMATION** since your last tax filing, or if this is your first year with us, please complete the area below:

Address including postal code:

Telephone: Cell _____ Home _____ Work _____

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

Your date of birth (if you are a new client): _____

Marital status. Please circle: Married / Common-Law / Divorced / Separated / Widowed

Date of change: _____

Dependants:

Child(ren) (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 _____
- 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 own an interest in a foreign affiliate at any time in the year (ownership of 10% or more of a foreign corporation)? Requires completion of Form T1134. Yes _____ No _____
- 6) 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 _____