



C&A PERSONAL TAX INFORMATION QUESTIONNAIRE

**(If new client provide copy of prior year return and sign T1013 for CRA access immediately)*

1. Name: _____
2. SIN: _____
3. Date of Birth: _____
4. Name of spouse or common law partner (if we don't prepare their return then please provide their net income): _____
5. Did your marital status change in the year? (Date of marriage, divorce or separation). Any spousal support; if so please provide legal agreement. _____
6. Did you have a child in the year? If so, list name and birth date & SIN#. _____
7. Name, SIN# and birth date of children _____
8. Email address: _____
9. Home & cell phone _____
10. Home address/physical address: _____
11. Did you move in the year? From where to where and what date? _____
(Provide receipts)
12. Are you a Canadian citizen? _____ Are you a US citizen? _____
13. Provide personal information to Elections Canada as to name, address, date of birth and citizenship? _____
14. Did you or your spouse own foreign property in the year with a total cost of \$100,000 Canadian dollars? _____
15. Did you buy or sell any non-RSP bonds, stocks, mutual funds or property in the year? Provide annual summary of gains/losses from your financial advisor. _____
16. Did you have child care expenses, children's arts or fitness credit expenses? _____
17. Interest on student loans or tuition/education slips (T2202)? _____

18. RRSP loans for home buyers or life-long learning plans? Any RRSP contributions or withdrawals? _____
19. Any rental houses, cabins or suites in your home rented? _____
20. Do you or any of your relatives have a disability? _____
21. Any donation slips or medical expenses (provide receipts) including medical travel greater than 40km one way?

22. Union dues? _____
23. Purchase any transit bus passes? _____
24. Any employment expenses? If so, provide signed copy of form T2200 (Declaration of Conditions of Employment). _____
25. Do you volunteer with a Fire Department or Search and Rescue Society? Yes ___ No ___
26. Have you signed up for Direct Deposit with the CRA? Yes ___ No ___
27. Do we have all of the applicable slips for?:

- RRSP contributions
- T4's
- T5's for interest or dividends
- OAS/ CPP benefits
- Pensions (T4A, T4RIF, US social security)
- T3 (other investment income)
- RC62 (Universal Child Care Benefit)
- T4E (Employment Insurance)

****CRA imposes a 20% penalty on income not reported in the current year if income has also been unreported in the past three years.**

This list is not an all inclusive list and other items may be applicable to complete your tax return. Please bring all applicable items in to us in order for us to complete your return.

Sign _____ Date _____