

Current Client Questions

Name: _____ Date: _____

1	To help save our environment we are moving towards paperless tax returns. Please provide us with an email address so that we may email you your return. Email:
	Spouse/Partner Email:
2	Do you own any foreign property/investments worth more than \$100,000. Cdn?
3	Have you moved? If yes, please complete below.
	Do you own? If yes, please complete below.
	Did you sell your principal residence?
	Did you own the property? Was your spouse on title?
	What year was your previous residence purchased?
	How much was your previous residence sold for?
	Have you moved more than 40 kms closer to work/school? If yes, please complete the back of this page
	What is your new address?
4	Have you changed your phone #?
	If yes, What is your new number?
	What is your spouse's/partner's new number
5	Do you have any new dependants?
	If yes, their full name is?
	Their date of birth is?
	Male Female
6	Any new slips? T4's? T5's? T3's?
7	Did you purchase any RRSP's
8	Did you withdraw any RRSP's
9	Has your marital status changed?
	If yes, how?
	What date?
10	Do you have any medical and/or donation receipts?
11	Are you signed up for direct deposit with CRA?
	If yes, is your direct deposit account info current?
12	Have you sold or purchased a rental property?