

Returning Client Questionnaire

During the most recent tax year, did you:

Name: _____

Email Address: _____

Preferred Telephone #: _____

How should we send your tax return? **Email** **Paper**

Address: _____

City: _____

Province: _____

Postal Code: _____

<p><u>Have a change in marital status?</u> __ Yes __ No. <i>*If yes, please indicate new status and spousal information, if applicable</i></p>	<p><u>New marital status</u> <u>Date of Status Change (dd/mm)</u> _____</p>	
	<p><input type="radio"/> Married <input type="radio"/> Single <input type="radio"/> Separated <input type="radio"/> Living common-law <input type="radio"/> Divorced <input type="radio"/> Widowed</p>	<p>Spouse's Name: _____ Date of Birth: _____ SIN: _____</p>
<p><u>Have any significant health changes for you or your family?</u> __ Yes __ No <i>*If yes, see right</i></p>	<p><i>Health matters can have significant impacts on tax liabilities. Please describe GENERALIZED nature below. (If you prefer to discuss changes in person, please indicate)</i></p>	
<p><u>Did you receive CERB Payments?</u> __ Yes __ No</p>	<p><u>Did you work from home due to COVID?</u> __ Yes __ No <i>*If yes, see right</i></p>	<p><u>How long did/have you worked from home?</u></p>
<p><u>Have or adopt any children?</u> __ Yes __ No <i>*If yes, see right</i></p>	<p>Name: _____ Gender: _____ Date of Birth: _____ SIN: _____</p>	<p>Name: _____ Gender: _____ Date of Birth: _____ SIN: _____</p>
<p><u>Buy or sell any real estate?</u> __ Yes __ No <i>*If yes, see right</i></p>	<p><u>Purchase Address:</u> _____ <u>Year of Purchase:</u> _____ City: _____ Province: _____ Postal Code: _____ <u>Purchase Price:</u> _____</p>	<p><u>Sale Address:</u> _____ <u>Year of Sale:</u> _____ City: _____ Province: _____ Postal Code: _____ <u>Sale Price:</u> _____</p>
<p><u>Hold any foreign investments with value over \$ 100,000?</u> __ Yes __ No <i>*If yes, see right</i></p>	<p>Nature of investment(s) (ie. securities, vacation home, rental property, etc.): _____</p>	<p>Market value of investment(s): _____</p>

Anything else we should know for this year's tax return(s)?