

Preparer Reviewer

Returning Client Questionnaire

During the most recent tax year:

Name(s):		Number of tax returns needed? <div style="border: 1px solid black; width: 60px; height: 30px; margin: 0 auto;"></div>
Email Address:		
Preferred Phone #:		
Your Copy of the Tax return	<input type="checkbox"/> PDF <input type="checkbox"/> Paper	
Additional Email(s):		

<u>Did your marital status change?</u>	<u>New marital status</u>	Date of Status Change (dd/mm)
Yes No <i>*If <u>yes</u>, please indicate new status and spousal information, if applicable</i>	<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	Spouse's Name: Date of Birth: SIN:
If <u>separated/divorced</u> is there a formal/informal agreement? Yes No		<i>*If <u>yes</u>, to either question, please supply a copy if not previously provided.</i>
Have there been any changes to an existing formal/informal agreement? Yes No		
<u>Any significant health changes?</u>	Please describe. (If you prefer to discuss changes in person, please indicate.) Ex. New DTC, fertility expenses, etc.	
Yes No <i>*If <u>yes</u>, see right</i>		
<u>Were there new dependents or persons living in your home?</u>	<u>Name(s):</u>	<u>Relation:</u>
Yes No <i>*If <u>yes</u>, see right</i>		If dependent Gender(s) & Date(s) of Birth & SIN(s):
<u>Will you be able to get a Doctor's note for any ongoing health conditions?</u> Yes No		
<u>Did you move last year?</u> Yes No	<u>New Address:</u>	
<u>Did you pay rent or property tax last year?</u> Rent Prop Tax No	Amount paid last year: (provide tax statement or receipts)	
<u>Did you buy or sell real estate?</u>	<u>Purchase Address:</u>	<u>Sale Address:</u>
Yes No <i>*If <u>yes</u>, see right</i>	Purchase Price:	Year of Purchase: Sale Price:
<u>Did you hold any foreign investments worth over \$ 100,000 or hold foreign shares totaling 10% of a company?</u>	Nature of investment(s) (ie. securities, vacation home, rental property, etc.):	Market value of investment(s):
Yes Investments Yes 10% Shares No		
<u>Did you open First Home Savings Plan?</u> Yes No	<u>Do you have access to CRA MyAccount?</u> Yes No	

If you are self-employed or have rental properties, please fill out the back of this page.

Rental Property	Self Employed
<p>If you have a new rental property, <u>please provide the purchase documents</u> for us to determine the cost base.</p> <p>If <u>data can be summarized</u> it will be much easier to process your return.</p> <p>For multiple properties, <u>please summarize each property's data separately.</u></p>	<p>Are you registered for HST? Yes No If yes, <u>what is your business number?</u> And, <u>do you require our assistance with filings?</u> Yes No If yes, <u>what is your filing frequency?</u> Monthly Quarterly Annually</p> <p>Do you use bookkeeping software? Yes No If no, <u>are your records summarized?</u> Yes No</p>
<p><u>Is your property used for short-term or long-term rental?</u></p> <p style="text-align: center;">Short-Term Long-Term</p> <p><u>If short-term, does it comply with all applicable by-laws?</u></p> <p style="text-align: center;">Yes No</p>	<p><u>If you use a vehicle for your business, please provide the following:</u></p> <p style="text-align: center;">Business Use KM Total KM driven</p> <p style="text-align: center;">OR</p> <p style="text-align: center;">Business Use Percentage %</p> <p><u>Common Expenses:</u> Fuel, repairs & maintenance, insurance, parking, etc</p> <p><u>Please provide a travel log of business activities:</u> – date, start and destination with odometer readings, reason for trips.</p> <p><u>Please provide lease documents if leasing.</u></p> <p><u>Please provide purchase/sale documents for new/sold/traded-in vehicles.</u></p>
<p><u>If your rental property is also used personally, please provide one of the following:</u></p> <p style="text-align: center;">Personal Sq Ft: Total Sq Ft:</p> <p style="text-align: center;">OR</p> <p style="text-align: center;">Personal Use Percentage %</p>	<p><u>If you used space within your home for business use, please provide one of the following:</u></p> <p style="text-align: center;">Business Use Sq Ft: Total Sq Ft:</p> <p style="text-align: center;">OR</p> <p style="text-align: center;">Business Use Percentage %</p> <p><u>Common Expenses:</u> Utilities – Gas/Propane, Hydro, water heater, etc, Insurance, Annual Mortgage Statement – for interest, Property taxes or rent, repairs and maintenance, condo fees, etc.</p>
<p><u>Common Rental Expenses to Provide:</u></p> <ul style="list-style-type: none"> ○ Insurance ○ Annual Mortgage Statement – for interest (and property taxes) ○ Property management fees ○ Maintenance and repairs ○ Major renovations – please provide receipts ○ Property tax statement ○ Utilities – Gas/Propane, Hydro, water heater, etc ○ Phone bill – include percentage of use for rental ○ Travel mileage – for property visits, supply runs, etc ○ Professional fees ○ Office supplies 	<p><u>Common Business Expenses to Provide:</u></p> <ul style="list-style-type: none"> ○ New asset purchases – please provide receipts ○ Cell phone/internet – include business-use percentage ○ Supplies ○ Professional Fees ○ Bank charges ○ Meals & entertainment ○ Rent
<p><u>Other Rental or Self Employed Comments:</u></p>	