

## Returning Client Questionnaire

First and Last Name: \_\_\_\_\_

E-mail Address, if it has changed \_\_\_\_\_

Have you moved or changed your mailing address?  Yes  No If so, please enter your new address below:

Address: \_\_\_\_\_  
Street Address
City
Prov.
Postal Code

If there were any additions to your family or dependents in 2023, please list below:

Name	S.I.N	Birth date	Net Income (if applicable)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Please Identify all of the taxpayers we will be filing for:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Sale of Real-Estate

Please note that all sales of real-estate property are required to be reported to CRA on your personal income tax return, including the sale of your principal residence. Please provide the following information for each real-estate sale transaction:

Original purchase price: \$\_\_\_\_\_ Sales proceeds: \$\_\_\_\_\_ Capital Additions: \$\_\_\_\_\_

Date of purchase: \_\_\_\_\_ Date of sale: \_\_\_\_\_

Was this property ever your Principal Residence?  Yes  No If yes, which years: \_\_\_\_\_

### Foreign Income Verification

Did you own certain property outside of Canada totaling more than \$100,000 at any time during 2023?  Yes  No

If yes, it may be necessary for you to declare such ownership in your tax return [Form T1135 Foreign Income Verification Statement]

There are substantial penalties for non-compliance.

Did you work more than 50% of the time from home for a period of at least four consecutive weeks in 2023?

Yes  No If yes, how many days at home \_\_\_\_\_x \$2.00 max is \$500

\*Provide signed T2200S signed by your employer.

**Additional information that you would like to provide:**

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