



Personal Information:

First Name: _____ Last Name: _____

Date of Birth: _____ Social insurance number: _____

Address: _____ City: _____ Province: _____

Postal code: _____ Marital status: _____

Phone number: _____ Email Address: _____

If Married: (Spouse Information)

Spouse's First and Last Legal Name: _____ Date of Birth: _____

Social insurance number: _____ Phone number: _____

Email Address: _____

Canadian Citizen? **YES** **NO**

General Questionnaire:

- | | | |
|-------------------------------------------------------------------------------------|------------|-----------|
| 1. Are you filing an income tax return with the CRA for the first time? | YES | NO |
| 2. Do you own foreign assets worth over \$100,000 CAD? | YES | NO |
| 3. Did you open your first home savings account during 2023? | YES | NO |
| 4. Do you authorize CRA to provide your name and email address to Ontario Health? | YES | NO |
| 5. Has your marital status changed since last year? | YES | NO |
| a. If yes, please provide the date and month (DD/MM): _____ | | |
| 6. Did you purchase a principal home for the first time? | YES | NO |
| 7. Have you sold your principal home during 2023? | YES | NO |
| 8. Have you sold any property during 2023 (i.e. rental property, investment, etc.)? | YES | NO |
| 9. Have you moved or changed your address since last year? | YES | NO |
| 10. Do you have a sole proprietor business income? | YES | NO |
| 11. Do you have rental property? | YES | NO |



12. Canadian Citizen?	YES	NO
13. Do you rent or own the property you live in?	RENT	OWN

Documents Checklist:

- Bring last year's (**2022**) notice of assessment.
- Bring last year's (**2022**) tax return if you have a copy. Not a Requirement.
- Bring all **2023** slips
 - **T4**
 - **T4A**
 - **T4RSP**
 - **T4E**
 - **T4FHSA**
 - **T3**
 - **T5**
 - **Other:** _____
- Bring your RRSP contribution slips, if any.
- Bring all professional dues receipts paid in **2023**.
- Bring all your **2023** Medical receipts (dentist, eyes, prescriptions medicine, etc.), if any.
- Bring all **2023** donation receipts and unused prior-year donations.
- Annual rent expense (letter from landlord, letter should include your name, address, period, and the amount paid).
- If you own your home, please provide your **2023** property tax documents.
- For a family with kids:
 - 1st Child
 - First and last name: _____
 - Birthday: _____
 - SIN Number: _____
 - Son Daughter
 - 2nd Child
 - First and last name: _____
 - Birthday: _____
 - SIN Number: _____
 - Son Daughter



- 3rd Child
 - First and last name: _____
 - Birthday: _____
 - SIN Number: _____
 - Son Daughter

- 4th Child
 - First and last name: _____
 - Birthday: _____
 - SIN Number: _____
 - Son Daughter

- For University or College students **only**:
 - Bring your **2023 T2202**.
 - Bring your OSAP loan statement, and you will only have that if you have already started repaying your OSAP.