

Personal Tax Questionnaire

Client Name: _____ Spouse Name: _____

Did any of the following life events occur in 2023 for you (check all that apply):

- Got married or became common-law;
 - New spouse name: _____
 - SIN: _____
 - DOB: _____
 - Date of marriage/union: _____
 - Net Income: _____
- Birth or adoption of a child;
 - New child name: _____
 - DOB: _____
- Got separated or divorced;
 - Date of separation/divorce: _____
- Purchased your first home;
 - Date purchased: _____
 - Address: _____
- Moved to a new home;
 - New address: _____
- Sold your principal residence;
 - Date sold: _____
 - Year of acquisition: _____
 - Proceeds: _____
- Parents (over 65) moved into your home;
 - Parent name: _____
 - SIN: _____
 - DOB: _____
 - Net income: _____

OR: None of the above apply for 2023 for me or my spouse

FOREIGN REPORTING:

In 2023, did you own any of the following foreign property worth more than \$100,000 CAD in aggregate:

- shares of a foreign company
 - funds held at a bank outside of Canada
 - real estate outside of Canada
 - partnership units of a partnership outside of Canada
 - loans to/from individuals or entities outside of Canada
- YES NO

INCOME:

Did you start to earn any of the following sources of income for the first time in 2023 (check all that apply):

- New employment income (started a new job in 2023)
- New self-employment income (started new self-employment in 2023)
- New pension income (including Old Age, CPP, RRIF or foreign pensions)
- New rental income

- New investment income (set up new investment accounts or purchased new investments)
- Gains/losses from the disposal of investments (incl. shares, bonds, mutual funds or real estate)
- New employment insurance benefits
- New scholarships
- New workers compensation board payments
- RRSP withdrawals in 2023
- New alimony or child support received in 2023 (please attach separation agreement)
- Foreign income or foreign taxes paid
- Own foreign property worth more than \$100,000 CAD, including foreign shares held in Canadian financial institutions
- Exercise stock options during the year
- Sold a residential property owned for less than 365 days

OR:

- My sources of income are the same as the previous tax year – no changes in 2023.

Provide supporting documents for all sources of income.

DEDUCTIONS AND CREDITS:

Did you have any of the following deductions or credits for 2023 (check all that apply):

- Interest on a new investment loan
- Income tax instalments
- Investment counsel fees
- Accounting fees for work done by a firm other than Goldsmith Kwok Accounting Group LLP
- Professional or union dues
- Employment expenses (please provide T2200 signed by employer)
- Alimony or separation allowances (please attach separation agreement)
- Tuition fees for yourself, spouse or dependant (please attach T2202 or TL11)
- Tax shelters or flow through shares
- Moving expenses (NB: must be >40 km closer to school or new work location)
- Child care expenses
- Adoption expenses
- Student loan interest
- RRSP contributions
- First Home Savings Account Contributions
- Home buyers' plan and lifelong learning plan withdrawals or repayments
- Charitable donations or political contributions
- Medical and dental expenses
- Disability credits
- Digital news subscription tax credit
- Home renovation for senior or person with disabilities
- Created a new secondary unit for a family member in your home

Provide supporting documents for all expenses you have identified above.

Additional Information or notes:

Are you a Canadian Citizen or Permanent Resident?

Do you own any Canadian residential property? YES NO

Your personal tax return will be assigned to a staff accountant as soon as possible and s/he will contact you directly with any further questions.

Please provide the best phone number for us to contact you:

Cell Office Home _____

The best day / time to reach you: _____