

# Personal Tax Questionnaire

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone Number(s): \_\_\_\_\_

Email(s): \_\_\_\_\_

Marital Status: \_\_\_\_\_

Children: \_\_\_\_\_

## 1. Did you sell your principal residence?

Yes       No

## 2. Have you sold any other property within the last year?

Yes       No

## 3. Do you own foreign investments costing more than \$100,000?

*(excluding personal property ie. vacation home)*

Yes       No

## 4. In which format would you like to receive/sign your Personal Tax Return?

Printed/In Office       Electronically/Client Portal

## 5. Are you waiting for any additional documents?

Yes       No      Description: \_\_\_\_\_

## 6. Do you want your original tax records returned?

*(if yes, please pick up before June 15th or the records will be shredded)*

Yes       No

## 7. Do you consent to CRA sending your email address to the Alberta Government so that you may receive information on organ and tissue donation?

Yes       No

Signature: \_\_\_\_\_