

Taxpayer Information Form

1. Personal Information

Title: Mr. Mrs. Other:

First Name:

Last Name:

Street Address:

City:

Province:

Postal Code:

Email:

Phone: +1

Date of Birth (YYYY-MM-DD):

Social Insurance Number (SIN):

Marital Status:

Married Single Common-Law Separated Divorced Widow

Spouse / common-law partner Name:

Did your marital status change during the year?

Yes No

Did any dependents (children, parents, etc.) live with you during the year?

Yes No

Do you, your spouse, or any of your dependents qualify for the Disability Tax Credit?

Yes No

2. Residence

Province or territory of residence on December 31:

Did you immigrate to Canada or emigrate from Canada during the year?

Yes No

3. Elections Canada

Are you a Canadian citizen?

Yes No

do you authorize the CRA to give your name, address, date of birth and citizenship to Elections Canada

Yes No

4. Foreign Reporting - T1135

Did you own or hold foreign property with a total cost of CAD \$100,000 or more at any time during the year?

Yes No

Did you own an interest in a foreign affiliate at any time during the year?

Yes No

Did you dispose of a housing unit, including a residential or rental property or the right to purchase a property during the year?

Yes No

Is your income zero?

Yes No

Did you pay any rent or property tax?

Yes No

5. Changing in Financial Situation

- ◆ Did the taxpayer declare bankruptcy during the year? Yes No
 - ◆ Did the taxpayer close an investment account during the year? Yes No
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6. Other Tax Information

Income & Business Information

- 1- Did you have any Canadian source income during the year? Yes No
- 2- Did you have any self-employed/business income? Yes No
- 3- Did you own any rental property or have rental income during the year? Yes No

Property & Investments

- 4- Did you dispose of any property (residential or rental) during the year? Yes No
- 5- Did you sell any investments (shares, crypto, securities)? Yes No
- 6- Did you have any foreign income from any source? Yes No
- 7- Did you sell any foreign property during the year? Yes No

Other Income & Deductions

- 8- Did you receive any tips/gratuities not shown on tax slips? Yes No
- 9- If an owner-manager of a corporation, did you have any shareholder loan outstanding?
Yes No
- 10- Did you receive/pay child or spousal support per separation agreement? Yes No
- 11- Did you receive any interest from CRA refunds? Yes No

Home & Investment Contributions

- 12- Did you purchase a new home and qualify as a first-time home buyer? Yes No
- 13- Did you withdraw or contribute to the Home Buyers' Plan (HBP)? Yes No
- 14- Did you make RRSP contributions during the year or first 60 days of the next year?
Yes No
- 15- Did you open an FHSA in 2023? Yes No

Work & Expenses

- 16- Did you pay union dues or professional fees (lawyer, accountant, etc.)? Yes No
- 17- Did you pay childcare expenses to a daycare/after-school program and receive a tax receipt? Yes No
- 18- Did you have any moving expenses? Yes No

19- Did you pay interest on an investment loan? Yes No
20- Did you pay interest on a student loan? Yes No

Education & Donations

21- Did you or your spouse/children pay tuition fees (T2202 form)? Yes No
22- Do you wish to transfer tuition fees from dependents? Yes No
23- Did you or your spouse make any charitable donations? Yes No
24- Did you make any provincial or federal political contributions? Yes No

Medical & Travel Expenses

25- Were you eligible to claim employment expenses? Yes No
26- Did you have medical expenses for yourself, your spouse, or dependents? Yes No
27- Did you pay for public transit (for Ontario seniors only)? Yes No

Taxes & Refunds

28- Did you make any tax instalments to CRA? Yes No
29- Do you want your tax refund deposited directly to your bank account?
Yes No (Direct deposit requested last year or I do not wish to)

7. Additional Notes

Attachments:

T4

T4A

T5

T 2202