

2023 T1 QUESTIONNAIRE

Name: _____ Telephone: _____
 Address: _____ Email: _____

Questions

- Did your address change since last tax season? If yes, please provide new address Yes No
- Did your marital status change during the year? If yes, what date? Yes No
- Did you own foreign property (including investments) at anytime in the year with a total cost of more than \$100,000? Yes No
- Do you want CRA to register you to vote with Elections Canada? Yes No
- Did you sell any real estate during the year (including personal home)? If yes, provide original purchase documents and the legal sales documents Yes No
- Did you buy, sell, trade or transact in bitcoin or other cryptocurrency during the year? Yes No
- Did you open a First Home Savings Account (FHSA) in 2023? If yes, please provide the date and details of contribution Yes No
- BC renter's tax credit: Are you a renter and did you pay rent to a landlord in 2023? Yes No
- Expanded trust reporting rules: Do you own real estate, investment accounts, or other assets through a Bare Trust or any other trust arrangement? Yes No

Other Information: (use this space to provide any other information relevant to your taxes)

How would you like to receive your year-end tax package Electronic PDF
Printed hard copy

I certify that the above information is accurate and complete

Signature: _____ Date: _____

For Office Use

Records	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Refund	<input type="text"/>
Items included:	_____		Owing	<input type="text"/>
	_____		CT Invoice	<input type="text" value="\$"/>

Records Kept By Office

- Medical over \$5,000
- Donations over \$5,000
- Other items _____
- GST return
- US Return to IRS
- T1135
- Loss carryback
- Pension split to sign?

Other information

MAIL COURIER PICKUP PDF