

# NEW T1 CLIENT QUESTIONNAIRE

Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Address: \_\_\_\_\_ Email: \_\_\_\_\_  
\_\_\_\_\_ T1013 Signed? Yes  No

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## Personal Information

SIN: \_\_\_\_\_ DOB: \_\_\_\_\_

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## Spouse information

Name : \_\_\_\_\_ SIN: \_\_\_\_\_  
Income: \_\_\_\_\_ DOB: \_\_\_\_\_

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## Dependent Information

Name : \_\_\_\_\_ SIN: \_\_\_\_\_  
Income: \_\_\_\_\_ DOB: \_\_\_\_\_

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Name : \_\_\_\_\_ SIN: \_\_\_\_\_  
Income: \_\_\_\_\_ DOB: \_\_\_\_\_

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Name : \_\_\_\_\_ SIN: \_\_\_\_\_  
Income: \_\_\_\_\_ DOB: \_\_\_\_\_

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## Questions

- Are you a Canadian Citizen? Yes  No
- Are you an Indian within the meaning of the *Indian Act*? Yes  No
- Do you have a Disability Tax Credit? Yes  No
- Did you sell any real estate during the year (including personal home) 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
- Do we have your prior year NOA and/or personal tax return Yes  No

I certify that the above information is accurate and complete

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