

Income Tax Return Questionnaire

Section 1 - Contact Information

IMPORTANT: You must state the address you wish to use to file your tax return. You will receive mailings from the governments at this address including cheques.

Client Name:

Date of Birth (dd/mm/yyyy):

Social Insurance Number:

Marital Status:

Street Number & Name, Apt:

City, Province, Postal Code:

Telephone Number: Home -

Work -

Email Address:

Are you a Canadian Citizen? Yes: No:

Do you wish to register with Elections Canada? (Only for citizens of Canada) Yes: No:

Do you wish to have your refund deposited directly into your Canadian bank account?

Yes: No: If you have selected yes, please provide a void cheque

Section 2 – Information for spouse and children

Spouse Name:

Spouse Date of Birth (dd/mm/yyyy):

Spouse Social Insurance Number & Net Income:

Child Name:

Child Date of Birth:

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Section 3 - Documentation Checklist

Important documents for income tax return:

- i) Federal T4 statement of remuneration (if you worked during the year)
- ii) Quebec Releve-1 statement of employment income (if you worked during the year)
- iii) Federal Notice of Assessment (if you filed taxes the previous year)
- iv) Quebec Notice of Assessment (if you filed taxes the previous year)

If you are a student:

- v) Federal T2202A tuition and education amounts (available from your institution)
- vi) Quebec Releve-8 tuition and education amounts (available from your institution)
- vii) Federal T4A (if you have received a scholarship, bursary, or similar award)

If you are a tenant:

- viii) Quebec Releve-4 property tax (available from your landlord)

Section 4 –Questions

1) For which taxation years are you filing an income tax return?

2010 2009 2008 Other:

2) Have you previously filed an income tax return with the federal government?

Yes No

3) Have you previously filed an income tax return with the Quebec government?

Yes No

4) Do you live alone?

Yes No

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5) Do you own foreign property with a total cost over \$100,000 CAD at any time during the year?

Yes No

6) Have you ever filed for personal bankruptcy?

Yes No

7) Were you covered during a portion of/throughout the year by a private medical insurance plan?

Yes No If yes, for which months?

8) Did you have any medical expenses not covered by insurance?

Yes No Medical insurance premiums may be tax deductible. Please provide a copy of your year-end pay stub from employment.

9) Did you make any charitable donations?

Yes No

10) Did you move more than 40km within Canada during the year to be closer to work and/or school? If the answer is yes and you have receipts for expenses you would like to claim, please answer the following:

- Date of move

- Date of start of new job/school

- Prior residential address

- Prior work/school address

- New work/school address

- Name of moving company

- Expense incurred \$

11) Did you have any investments during the year?

Yes No

10) Did you receive income from a rental property?

Yes No

12) Did purchase monthly public transit passes during the year? If yes, please provide all invoices.

Yes No

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13) Did you receive any employment income from outside of Quebec, but from within Canada?

Yes No

14) Did you move to Quebec from another province within Canada?

Yes No **If yes, please indicate date of arrival (dd/mm/yyyy)**

15) If you arrived in Canada during the year, on what date did you arrive?

(dd/mm/yyyy)