Personal Tax Questionnaire

For the 2026 tax year (returns filed in 2027). Please complete one questionnaire per household before sending your documents. Answer every question; where the answer is Yes, include the related documents with your upload.

Do not write your social insurance number on this form. Save the completed form and upload it through the client portal with your slips and receipts.

1. About you

Full legal name | Date of birth (YYYY-MM-DD) | Phone

Email address | Occupation

Home address (number and street, apartment) | City | Province | Postal code

Is this the same address as on your 2025 return? ☐ Yes ☐ No

If No, date of the move:

Marital status on December 31, 2026

☐ Single ☐ Married ☐ Common-law

☐ Separated ☐ Divorced ☐ Widowed

Did your marital status change during 2026? ☐ Yes ☐ No

If Yes, date of the change:

Did you become a resident of Canada, or cease to be one, during 2026? ☐ Yes ☐ No

If Yes, date of arrival or departure:

Are you a Canadian citizen? ☐ Yes ☐ No

Is this the first year this firm prepares your return? ☐ Yes ☐ No

If Yes, name of your previous preparer (optional):

2. Spouse or common-law partner

Complete if you were married or living common-law at any time in the year.

Full legal name	Date of birth (YYYY-MM-DD)	Occupation

Will this firm also prepare your spouse or partner's return? ☐ Yes ☐ No

If No, their net income for the year (federal line 23600):

Did you live at the same address as your spouse or partner on December 31, 2026? ☐ Yes ☐ No

3. Dependants

List children and any other person who depended on you for support during the year.

Full name	Date of birth	Relationship	Lived with you (months)	Net income

Does any dependant have a physical or mental impairment? ☐ Yes ☐ No

Did you share custody of a child with another person during the year? ☐ Yes ☐ No

If Yes, describe the arrangement:

Was a child born or adopted during the year? ☐ Yes ☐ No

4. Income

Indicate whether you (or your spouse, if I prepare both returns) had each type of income in 2026.

Employment income (T4 / RL-1 slips)	☐ Yes	☐ No
Tips, commissions or other employment amounts not shown on a slip	☐ Yes	☐ No
Self-employment, freelance, business or professional income	☐ Yes	☐ No
Income from a digital platform (ride sharing, delivery, short-term rental, online sales)	☐ Yes	☐ No
Rental income from real estate	☐ Yes	☐ No
Interest, dividends or other investment income (T5 / RL-3, T3 / RL-16)	☐ Yes	☐ No
Sale or transfer of shares, mutual funds, cryptocurrency or other investments (T5008 / RL-18)	☐ Yes	☐ No

Sale or transfer of real estate, including a principal residence	☐ Yes	☐ No
Pension, annuity, RRSP or RRIF withdrawals (T4A / RL-2, T4RSP, T4RIF)	☐ Yes	☐ No
Old Age Security, Canada Pension Plan or Québec Pension Plan benefits	☐ Yes	☐ No
Employment insurance or Québec parental insurance benefits (T4E / RL-6)	☐ Yes	☐ No
Social assistance, workers' compensation or similar payments (T5007 / RL-5)	☐ Yes	☐ No
Spousal or child support payments received	☐ Yes	☐ No
Scholarships, bursaries or research grants	☐ Yes	☐ No
Income from a partnership, trust or estate (T5013 / RL-15, T3 / RL-16)	☐ Yes	☐ No
Income from sources outside Canada, including foreign employment or pensions	☐ Yes	☐ No
FHSA, RESP or RDSP withdrawals	☐ Yes	☐ No

Any other income or amounts received during the year (describe):

5. Deductions and credits

Indicate whether each item applies to you for 2026.

Contributions to an RRSP, a spousal RRSP or a pooled plan (including the first 60 days of the following year)	☐ Yes	☐ No
Contributions to a First Home Savings Account (FHSA)	☐ Yes	☐ No
Union or professional dues not shown on a slip	☐ Yes	☐ No
Childcare expenses (daycare, day camp, babysitting; RL-24)	☐ Yes	☐ No
Medical, dental, vision or prescription expenses not reimbursed by insurance	☐ Yes	☐ No
Premiums paid to a private health or dental insurance plan	☐ Yes	☐ No
Charitable donations	☐ Yes	☐ No
Political contributions (federal or Québec)	☐ Yes	☐ No
Tuition fees for you or a dependant (T2202 / RL-8)	☐ Yes	☐ No
Interest paid on a government student loan	☐ Yes	☐ No
A move of at least 40 km for work, business or full-time studies	☐ Yes	☐ No
Spousal or child support payments made	☐ Yes	☐ No
Employment expenses required by your employer (T2200 / TP-64.3 signed)	☐ Yes	☐ No

Work from home required by your employer	☐ Yes	☐ No
Investment-related expenses (interest on money borrowed to invest, management fees)	☐ Yes	☐ No
A disability tax credit certificate (T2201) on file for you or a dependant	☐ Yes	☐ No
Care or support provided to a relative with an impairment	☐ Yes	☐ No
Home-support services for a person aged 70 or over	☐ Yes	☐ No
Home accessibility or multigenerational home renovation expenses	☐ Yes	☐ No
Purchase of a first home during the year	☐ Yes	☐ No
Fees paid for a children's activity or for an adoption	☐ Yes	☐ No

6. Housing and Québec items

On December 31, 2026, you were

☐ Tenant ☐ Owner ☐ Living with family ☐ Other

Did you receive an RL-31 slip from your landlord, or do you have your property tax roll number?	☐ Yes	☐ No
Did you live alone, or only with dependent children, for the whole year?	☐ Yes	☐ No

Prescription drug insurance during the year

☐ RAMQ (public plan) all year ☐ Private group plan all year ☐ Both, part of the year each

If covered by both: months under the RAMQ plan

Months under a private plan

Did you receive advance payments of a Québec tax credit (RL-19)?	☐ Yes	☐ No
Did you pay tax by instalments during the year (federal or Québec)?	☐ Yes	☐ No

If Yes, total paid to each:

7. Property and foreign reporting

Did you own specified foreign property with a total cost of more than CAN$100,000 at any time in the year (foreign bank accounts, shares held outside Canada, foreign real estate other than personal use)?	☐ Yes	☐ No
Did you sell, or change the use of, a home you lived in?	☐ Yes	☐ No

If Yes, dates of purchase and sale:

Did you sell real estate that you owned for less than 365 days?	☐ Yes	☐ No
Do you own a rental property or a share of one?	☐ Yes	☐ No

Did you receive a gift or inheritance of property that produces income?	☐ Yes	☐ No
Did you transfer or lend property or money to your spouse or to a child under 18?	☐ Yes	☐ No
Do you hold shares of a private corporation, or did you receive a loan from one?	☐ Yes	☐ No
Are you a United States citizen or green card holder?	☐ Yes	☐ No

8. Correspondence and other information

Did you receive a notice of reassessment, a review letter or a request for information from the CRA or Revenu Québec during 2026?	☐ Yes	☐ No
Has your bank account for direct deposit changed since your last return?	☐ Yes	☐ No
Do you have unpaid balances or a payment arrangement with the CRA or Revenu Québec?	☐ Yes	☐ No

Changes in your situation during 2026 (new job, retirement, birth, death in the family, purchase or sale of a home, new business):

Anything else you would like me to know:

9. Documents included with this questionnaire

Tick each document you are uploading.

- ☐ 2025 federal notice of assessment
- ☐ 2025 Québec notice of assessment
- ☐ T4 / RL-1 (employment)
- ☐ T4A / RL-2 (pension, other income)
- ☐ T4A(OAS), T4A(P) / RL-2 (OAS, CPP, QPP)
- ☐ T4E / RL-6 (EI, QPIP)
- ☐ T5 / RL-3 (investment income)
- ☐ T3 / RL-16 (trust income)
- ☐ T5008 / RL-18 and realized gain or loss report
- ☐ T5013 / RL-15 (partnership)
- ☐ RRSP and FHSA contribution receipts
- ☐ T2202 / RL-8 (tuition)
- ☐ RL-31 (rental housing) or property tax bill
- ☐ RL-24 and childcare receipts
- ☐ Medical expense receipts and insurance statement
- ☐ Donation receipts
- ☐ T2200 / TP-64.3 (employment conditions)
- ☐ Union or professional dues receipts
- ☐ Student loan interest statement
- ☐ Moving expense receipts
- ☐ Rental income and expense summary
- ☐ Business income and expense summary
- ☐ Vehicle log and home office details
- ☐ GST/QST numbers and returns filed
- ☐ Support payment agreement or court order
- ☐ Foreign income and foreign property details
- ☐ CRA or Revenu Québec letters received
- ☐ Proof of date of arrival in Canada

10. Declaration

I confirm that the information in this questionnaire and in the documents provided is complete and accurate to the best of my knowledge, and that I have reported all income from all sources, inside and outside Canada.

Your name	Signature (type your full name)	Date

Spouse or partner's name (if applicable)	Signature (type full name)	Date