

an Association to practice Chartered Professional Accountancy

Name(s): _____

Please include the completed questionnaire with your tax documents when submitted.
This is a fillable PDF and can be filled out directly on your computer or printed.

What is your preferred delivery method for your completed tax return? (secure online portal is recommended)

Online
Portal

In Person
(In Office)

Mail/
Courier

Email

Yes No

Has your home address, email address, or phone number changed in the last year?

If yes, please provide details in the following field

Yes No

Has your family situation changed in the last year? (ex. births, deaths, marital status, etc.)

If yes, please provide details in the following field

Yes No

Has your direct deposit information changed in the last year?

If yes, please provide a direct deposit form or void cheque (applicable only in the event that you are due a tax refund)

Yes No

Did you purchase or sell a principal residence or any other real estate?

If yes, please provide purchase and sale details

Yes No

Did you receive any tax slips? (T3, T4, T5, T5008, T5013, U.S. tax slips, etc.)

If yes, please provide all tax slips you received

Yes No

Did you make any donations to registered charities or political parties?

If yes, please provide tax receipts

Yes No

Did you or your immediate family incur any significant medical or dental expenses?

If yes, please provide receipts and/or detailed prescription summaries (obtained from your pharmacy)

Yes No

Did you make any RRSP contributions from March 2, 2023 to February 29, 2024?

If yes, please provide RRSP contribution slips

Yes No

Did you make any First Home Savings Account (FHSA) contributions?

If yes, please provide FHSA contribution slips

Yes No

Did you pay any union/professional dues?

If yes, please provide tax receipts

Yes No

Did you pay any child care expenses?

If yes, please provide tax receipts

Yes No

Did your employer provide you with a signed T2200 for employment expenses?

If yes, please provide a copy along with details of employment expenses

Yes No

Did you (or a child) attend post-secondary education or pay any student loan interest?

If yes, please provide T2202 tuition tax receipt(s) and/or student loan interest tax receipt(s)

Yes No

Did you pay or receive any spousal support?

If yes, please provide details of amounts as well as the court order/written agreement

Yes No

Did you have any business, rental, or farming activities?

If yes, please provide details (or a summary) of all income and expenses

Yes No

Did you hold foreign assets with a combined cost of at least \$100,000 at any time in 2023?

Yes No

Are you a citizen of the United States?



Medicine Hat Office

Gaslight Plaza
307, 579 3 St SE
Medicine Hat, AB T1A 0H2
Tel · 403-526-5011
Fax · 403-526-1011

Swift Current Office

140 2nd Ave. NW
Swift Current, SK S9H 0P2
Tel · 306-773-6262
Fax · 306-773-8065