

SAVEWAY TAX SERVICES

Please complete one questionnaire to document all household members in this submission to our office.

Date: _____

TAXPAYER**SPOUSE (other taxpayer)**

Name: _____

Address: _____

(no change)(new)

Birth date(s): _____

Tel: Res: _____ Bus: _____ Cell: _____

Email address : _____

Legal/Marital Status: Married Common-law Widowed Divorced Separated Single**(Moving in with a partner or dissolving a relationship could signal a change in legal status for income tax purposes. Ask to review the CRA definitions if uncertain.)**

Date of change of marital status: _____

Own FOREIGN PROPERTY at any time in year with total cost over CAN\$100,000?Yes No **(including real property [other than personal use property], bank accounts held outside of Canada, foreign investments [including foreign property held in an account with a Canadian registered securities dealer or a Canadian trust company], etc.)****Did you SELL A HOME (house, condo, etc.) or was there a change in use in the year?**Yes No **If you answered 'No' to the above question, skip directly to the next section below pertaining to name on title for a residential property.****Was the home your principal residence Yes No** **(If not the sale of a principal residence, please make an appointment to discuss with one of our consultants or preparers.)****Was there a change in use of your principal residence Yes No** **(This could include, for example, converting some or all of our principal residence into an income earning property or ending the rental of some or all of your residence. If yes, please provide detail on the back side of this sheet.)****Year of acquisition:** _____**Address:** _____**Proceeds of disposition :** _____**(price received after any real estate commissions and/or legal fees)****Is your name on title for a residential property in which you do not reside?**Yes No **(This could include, for example, a parent adding an adult child to the title of their property for probate/estate planning purposes OR a child adding a parent to the title of their property in order to obtain financing.)****If you answered 'Yes' to the above question, you may be subject to new reporting and disclosure rules for certain trusts resident in Canada (e.g. bare trusts*) as well as a filing obligation under the Underused Housing Tax (UHT). Please note that trust returns and UHT returns are altogether separate filings to the yearly Income Tax and Benefit Return. You may want to request further information from our reception staff.**

* Many parties involved in a bare trust arrangement may not realize that they are, much less that there may be a filing requirement with CRA. No lawyer may have been involved and no written agreement may have ever been drafted. Although the examples presented here involve title of residential property, there are several more potential examples of bare trust arrangements, such as names on accounts with financial institutions.

Please proceed to the back side of this document.



Dependents: (Any additions during the tax year?)

Name	Relationship	Date of Birth
_____	_____	_____
_____	_____	_____
_____	_____	_____

Are you a Canadian citizen? Yes No

Provide information to Elections Canada? Yes No

Additional detail/notes pertaining to your tax situation:

We will contact you if we need additional information / clarity.

I, _____ (print name) _____, attest that the information disclosed on this sheet is to the best of my knowledge complete and accurate.

Signature: _____