

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 Dependents section below.

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)

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

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

Signature: _____

Additional detail/notes to be written on back side of sheet.