



2023 CLIENT EXPRESS QUESTIONNAIRE

- SIN number _____ Birth Date (Y M D) (YYYY / MM / DD)
First Name ☐ Mr ☐ Mrs ☐ Ms ☐ Miss _____ Middle Initial _____ Last Name _____
- What was your marital status at December 31st of the tax year?
☐ Married ☐ Common-Law ☐ Widowed ☐ Divorced ☐ Separated ☐ Single (never been married)
*Did your marital status changed during the tax year? Date of change: _____ Previous Status: _____
*If married or C/L, would you like to split any eligible pension(s) with your spouse to maximize tax savings? ☐ Yes ☐ No
- Did your name change in the tax year? ☐ Yes ☐ No
- Are you a Canadian Citizen? ☐ Yes ☐ No
- Do you own or rent your home? ☐ Own ☐ Rent
- Address _____ City _____ Prov _____ PC _____
E-mail _____ Phone: Home) _____ Cell) _____
- Would you like to receive a Text Message when your taxes are completed? ☐ Yes ☐ No
- What was your province of residence at December 31st of the tax year? _____
- Did you move from another province in Canada in 2023 or 2024? ☐ Yes ☐ No Date: _____
- Did you move to/out of Canada in the tax year? ☐ Yes ☐ No Year/Month/Day _____
- If you are married or common-law and TaxTeam is not filing the tax return for your spouse, please ensure we have the following information regarding your spouse: Has your spouse already filed their tax return in the tax year? ☐ Yes ☐ No

- | SIN | Birth Date | First Name | Last Name | Net Income (Line 23600 of tax return) |
|--------------------------|------------|--|---|---------------------------------------|
| Is your Spouse Disabled? | | <input type="checkbox"/> Yes <input type="checkbox"/> No | If yes; Last year of Eligibility: _____ | |
- Do you have a disability? ☐ Yes ☐ No Last Year of Eligibility: _____
 - Was your spouse dependant on you due to a mental or physical infirmity? ☐ Yes Infirmity: _____ ☐ No
 - Did the taxpayer die in the tax year? ☐ Yes ☐ No Year/Month/Day _____
*If yes, Legal Representative Name: _____ ☐ Executor ☐ Administrator Phone #: _____
 - Did your spouse die in the year? ☐ Yes ☐ No Year/Month/Day _____
 - Did you declare bankruptcy in the tax year? ☐ Yes ☐ No Date: _____ Date of Discharge: _____
 - Were you confined to prison or a like institution for a period of 90 days or more in the tax year? ☐ Yes ☐ No
 - If you are a Canadian Citizen, do you authorize the Canada Revenue Agency to give your name, address, and date of birth and citizenship to Elections Canada for the National Register of Electors? ☐ Yes ☐ No
 - Did you own any foreign property/investments at any time in 2023 with a total cost of more than \$100,000? ☐ Y ☐ N
 - Did you sell any property in 2023 (including your house) or change it to a business or rental property? ☐ Yes ☐ No
If yes; Address _____ Year Acquired _____ Sale Value _____
 - Do you want to start/change Direct Deposit with CRA ☐ Yes ☐ No
 - Were you a first-time home buyer in the tax year? ☐ Yes ☐ No Date of Possession: _____
 - Do you have dependants? ☐ Yes ☐ No Please list any children you claim below (attach another page if needed)

Gender	1) <input type="checkbox"/> Boy <input type="checkbox"/> Girl	2) <input type="checkbox"/> Boy <input type="checkbox"/> Girl	3) <input type="checkbox"/> Boy <input type="checkbox"/> Girl	4) <input type="checkbox"/> Boy <input type="checkbox"/> Girl
Full Name				
SIN				
Birth Date				
Net Income				
Disability?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Custody? (Shared/Sole)	(if shared: _____%)	(if shared: _____%)	(if shared: _____%)	(if shared: _____%)

- Did you pay or receive any support payments? ☐ Child ☐ Paid \$ _____ ☐ Received \$ _____
If New Client: ☐ Spousal ☐ Paid \$ _____ ☐ Received \$ _____

- How did you find us? _____ Who prepared your last tax return? _____
- Did you sign the Authorization request page ([AuthRep](#)) and include it with your forms? (Required) ☐ Yes ☐ No
- Additional Info? _____

2023

Tax Year

Taxpayer Signature

Date