



## 2020 EXPRESS QUESTIONNAIRE

1. First Name \_\_\_\_\_ Last Name \_\_\_\_\_ Name change in 2020?  N  Y  
 Do you have a disability?  No  Yes \_\_\_\_\_ Last Year of Eligibility: \_\_\_\_\_  
 Address \_\_\_\_\_ City \_\_\_\_\_ Prov. \_\_\_\_\_ PC \_\_\_\_\_  
 Phone: Home) \_\_\_\_\_ Cell) \_\_\_\_\_ E-mail \_\_\_\_\_  
 Would you like to receive a Text Message when your taxes are completed?  No  Yes

2. Were you a first time home buyer in the tax year?  No  Yes Date of Possession: \_\_\_\_\_

3. Did you sell any property in 2020 (including your house) or change it to a business or rental property?  
 No  Yes If yes; Address \_\_\_\_\_ Year Acquired \_\_\_\_\_ Sale Value \_\_\_\_\_

4. What was your province of residence at December 31<sup>st</sup> of the tax year?  SK  Other \_\_\_\_\_

5. Did you move from another province in Canada in 2020 or 2021?  No  Yes Date: \_\_\_\_\_

6. What was your marital status at December 31<sup>st</sup> of the tax year?  
 Married  Common-Law  Widowed  Divorced  Separated  Single (never been married)

\*If your marital status changed during the tax year, record the date of change: Year/Month/Day \_\_\_\_\_

\*If married or C/L, would you like to split any eligible pension(s) with your spouse to maximize tax savings?  No  Yes

7. 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:

SIN	First Name	Last Name	Net Income (Line 23600 of tax return)
Who is claiming the Climate Action Incentive "Carbon Tax Rebate" <input type="checkbox"/> I am claiming <input type="checkbox"/> My spouse will be claiming it			
Is your Spouse Disabled? <input type="checkbox"/> No <input type="checkbox"/> Yes If yes; Last year of Eligibility: _____			

### 8. Changes in Tax Year

If you answer "Yes" to any of these questions, please record the date it occurred: \_\_\_\_\_ Year/Month/Day

Did the taxpayer die in the tax year?  No  Yes \_\_\_\_\_

Did you declare bankruptcy in the tax year?  No  Yes \_\_\_\_\_

Did you move to/out of Canada in the tax year?  No  Yes \_\_\_\_\_

9. Are you a Canadian Citizen?  No  Yes If "yes":  
 As 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?  No  Yes

10. Were you confined to prison or a like institution for a period of 90 days or more in the tax year?  No  Yes

11. Do you have dependants?  No  Yes  
 Please list any changes or additions below (include Full Name, SIN, Birth Date, Net Income, and Disability, if any).

Please list the net income for any dependants for which TaxTeam is not preparing a tax return. \_\_\_\_\_

12. Did you pay or receive any support payments?  Child  Spousal Amount \$ \_\_\_\_\_  Paid  Received

13. Do you own or rent your home?  Own  Rent

14. Do you qualify for the Saskatchewan graduate retention program for post secondary schooling?  No  Yes

15. Did you purchase RRSP's for the tax year?  No  Yes If "yes", RRSP contribution limit? \_\_\_\_\_

16. Do you want to start/change Direct Deposit information with Canada Revenue:  No  Yes (attach cheque)

17. Did you receive any CERB, CRB or other COVID subsidy payments in 2020?  No  Yes

18. Did you have a HOME OFFICE during COVID-19?  No  Yes

19. Additional Info? \_\_\_\_\_