Count myAccount

Questionnaire
Individual Tax Planning

Tax Year: 20_____

Residency Status: ☐Canadian resident ☐Newcomer ☐Non-resident ☐U.S person

Client Information: Name: _____ City: _____ Province: _____

Email: _____ Mobile: _____

Marital Status: ☐Single ☐Married ☐Common-law ☐Widowed ☐Separated ☐Divorced

Spouse name (if applicable): _____ Net Income: $ _____

Dependents (if applicable) Children, Parents, Grandparents, etc. (living at the same address):

☐None ☐Yes – Number: _____ Disabled Dependents ☐NO ☐Yes – Childcare expenses ☐NO ☐Yes

Income Sources (Check if applicable) Mention the estimated annual amount**:**

	Title	$Amount		Title	$Amount
☐	Employment		☐	Self-employed	
☐	EI		☐	Pension	
☐	CPP/OAS		☐	RRSP withdrawals	
☐	Student		☐	Rental	
☐	Investments		☐	Foreign Income	
☐			☐		

Owned real state: ☐ Principal residence ☐ Rental property ☐ Vacation property

Registered Accounts: ☐RRSP ☐TFSA ☐FHSA ☐RESP ☐Pension

Key Tax Questions: ☐ CRA reviews, reassessments, or disputes ☐Medical expenses ☐ Moving Expenses ☐ Disability credit ☐Employment expenses (T2200) ☐Foreign property>$100K ☐ RRSP contribution ☐ FHSA contribution ☐ Sold real estate

Have you experienced or expect any of the following Life Events?

☐Marriage/Separation ☐Home purchase/sale ☐New child ☐Immigration ☐Retirement

Goals & Priorities: ☐Reduce annual tax payable ☐Increase fund ☐Plan retirement ☐Optimize investments ☐Income splitting ☐Plan large transaction ☐Improve cash flow

Time horizon for planning: ☐Short-term (this year) ☐Medium-term (1-3 years) ☐Long-term (3+ years)

Any other relevant information, specific concerns or questions?

Acknowledgment: I understand that tax planning is advisory in nature and does not replace tax filing unless separately engaged.

Your Signature: _____ Date: _____