

**LEONA SABBADIN INC., CPA'S  
PERSONAL TAX QUESTIONNAIRE**

Name: \_\_\_\_\_ Tax Year: \_\_\_\_\_

1) **IF THERE HAVE BEEN ANY CHANGES IN YOUR PERSONAL INFORMATION** since your last tax filing, or if this is your first year with us, please complete the area below:

**Address including postal code:**  
\_\_\_\_\_

**Telephone:** Cell \_\_\_\_\_ Home \_\_\_\_\_ Work \_\_\_\_\_

**Email Address** (Please provide only if we don't already have) \_\_\_\_\_

**Your date of birth (if you are a new client):** \_\_\_\_\_

**Marital status. Please circle:** Single / Married / Common-Law / Divorced / Separated / Widowed

Date of change (if applicable): \_\_\_\_\_

**Dependants:**

Child(ren) (please provide name & date of birth) \_\_\_\_\_

Disabled parent (please provide name, date of birth and date they moved in with you) \_\_\_\_\_

\_\_\_\_\_

- 2) Are you a Canadian Citizen? Yes \_\_\_\_\_ No \_\_\_\_\_
- 3) Do you authorize Canada Revenue Agency (CRA) to provide your name, address and date of birth to Elections Canada for the National Register of Electors? Yes \_\_\_\_\_ No \_\_\_\_\_
- 4) Did you own or hold specified foreign property (such as investments, real estate (*NOT personal use property*)) or loans with a total cost of more than \$100,000 CDN at any time during the year? (see the T1135 Instructions for a detailed list) Yes \_\_\_\_\_ No \_\_\_\_\_
- Unsure \_\_\_\_\_
- (If you are unsure, please complete the Foreign Reporting Checklist)*
- 5) Did you own an interest in a foreign affiliate at any time in the year (ownership of 10% or more of a foreign corporation)? Requires completion of Form T1134. Yes \_\_\_\_\_ No \_\_\_\_\_
- 6) Did you sell or dispose of real estate property (including a principal residence) or change the use of property from personal to income producing, or vice versa during the year? Yes \_\_\_\_\_ No \_\_\_\_\_

\_\_\_\_\_  
Signature Date

**MISSING INFORMATION AND NOTES**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date Received \_\_\_\_\_ P/Y fee \_\_\_\_\_