

NEW CLIENT QUESTIONNAIRE 2021

Primary Contact Name	Spouse Name
Social Insurance No.	Social Insurance No.
Date of Birth	Date of Birth
Phone (home)	Phone (Home)
Phone (cell)	Phone (cell)
Email	Email

Current address	Previous address – if moved during the year
Province of residence Dec. 31 st ?	Date of move:

Dependent Name	Social Insurance No.	Date of Birth (Month/Day/Year)		

Marital status on December 31 st (circle one) Single Married Common-law Divorced Separated Widowed	
If marital status changed during the year, provide the date of change:	
Do you have, or share, custody of a child after a relationship breakdown?	Yes No
Did you own or hold foreign property with a cost of \$100,000 or more at any time during the year (Including United States property and/or shares/stocks)?	Yes No
Do you spend the winter in the United States? Are you a U.S. citizen, Green Card Holder, or were you, or your parents born in the United States?	Yes No
May CRA provide information to Elections Canada?	Yes No
Did you receive interest, dividends or benefits from a business in which a relative is a key party (in terms of ownership or involvement)?	Yes No
Internet Business Activity: Do you have a webpage or websites that earn income?	Yes No
Are you missing any information slips (T4, T5, T4A, etc.)? If yes, provide details.	Yes No
As a Canadian resident, have you reported income from all sources, both inside and outside Canada?	Yes No
Did you receive a retroactive lump-sum payment over \$3,000 (eg. Spousal support)? In certain cases, some tax relief may be available.	Yes No
Did you receive income, support or benefits under COVID-19 relief programs (CERB, CRB) or any federal government support for business, rental or other income (CEBA, CERS, CEWS)?	Yes No
Did you receive any significant prizes or awards from your or a related person's place of employment?	Yes No
Did you incur costs to access medical intervention in order to conceive a child which was not previously allowed as a medical expense? Amounts may be claimed in respect of any such expense for the previous 10 years.	Yes No
Did you sell your principal residence during the year? If yes, please provide: Address of property _____ Year of acquisition _____ Proceeds of disposition \$ _____	Yes No
Did you purchase a new home during the year? If so, you may be eligible for the new residential property GST/HST rebate. Are you a first-time home buyer in 2021? A tax credit based on \$5,000 (@ 15%=\$750).	Yes No
-Are you disabled or any of your dependents disabled? If so, provide Form T2201, Disability Tax Credit Certificate. The transfer rules allow claims for certain dependent relatives such as parents, grandparents, child, grandchild, brothers, sisters, aunts, uncles, nephews or nieces. In addition, are you, or would you like to provide support to a disabled person? Tax planning opportunities may be available, such as the establishment of a Registered Disability Savings Plan. -Persons with disabilities also may receive tax relief for the cost of disability supports (eg. sign language services, talking textbooks, etc.) incurred for the purpose of employment or education. If you or your dependents are disabled but don't have a T2201 Form, please provide details so	Yes No

we can explore whether you are eligible for special credits of benefits.			
Did you provide In-home care for an infirm dependent relative, a federal credit may be available. Are you a caregiver for any infirm family members?		Yes	No
Did you have significant medical expenses during the year? If yes, please refer to https://www.canada.ca/en/revenue-agency/services/forms-publications/publications/rc4065/medical-expenses.html for more information as well as the medical expense worksheet.		Yes	No
Have there been any changes in family circumstance that could affect the Goods and Services Tax Credit, such as births, deaths, marriages, reaching the age of 19 years, and becoming or ceasing to be a resident in Canada?		Yes	No
Have there been any significant life events in the past year, such as the death or impairment of a loved one? There can be tax planning opportunities		Yes	No
Do you have a will? Many problems may arise, if there is no will in place.		Yes	No
How would you like to receive correspondence from us in the future (please circle)?		Email	Mail

Northern Residents Deduction:			
1. Did you reside in a prescribed northern zone for a continuous period of at least six consecutive months? If not the full year, provide dates: from _____ to _____.		Yes	No
2. Please provide supporting documentation (property tax notice, rent receipts, utility bill).			
3. Will any others who are sharing this residence be claiming the Northern Residents deduction?		Yes	No
4. Does your T4 include Box 32 Northern Travel? If yes, provide information for two trips you took during the year including dates, destination, and names of all family members travelling. Please refer to https://www.canada.ca/en/revenue-agency/services/forms-publications/publications/rc4650/northern-residents-deductions.html#cydctb for more information as well as the Northern Travel Benefit worksheet.		Yes	No

It is understood that you will provide us with accurate and complete information necessary to compile your personal tax return. We will not audit, review or otherwise attempt to verify the accuracy or completeness of any information provided. The responsibility for the accuracy of the information and completeness of the representations reflected in your return remains with you.

To Brenda Friedel Professional Corporation, I confirm the following:

To the best of my knowledge and belief, the information provided is complete and accurate, reflecting all sources of income. Business expenses (if applicable), including but not limited to, remuneration paid to family members, business use of personal vehicle and home office, meals, entertainment and travel are reasonable and were incurred to earn business income.

I certify the above answers and certification to be true and correct.

Signature _____ **Date** _____

OTHER COMMENTS OR INFORMATION: