

CRIMSON ENTERPRISES

2022 T1 Client Tax Questionnaire

Each individual must complete this form. If more room is needed, please use the back of the form.

1. Name: First _____ Last _____
2. Is this your first return? Y N
3. Has your name changed since your last return? Y N
4. SIN: _____ (*leave blank if we processed your tax return in a previous year*)
5. Date of birth: (YY/MM/DD): _____ (*ignore this if we've previously processed your tax return*)
6. Your address for our records: (*ignore this if it's the same as last year's tax return*)
Care of: _____
Address: _____
City _____ Prov _____ Postal Code _____
7. Phone number: Home _____ Cell _____ Work _____
8. Province (Territory) of residence on Dec 31, 2022: _____
9. If you were self employed in 2022, enter Province (Territory) of self employment: _____
10. If you became or ceased to be a resident of Canada in 2022, give the date of:
Entry (month-day) _____ or, departure (month-day) _____
11. Marital Status on Dec 31, 2022:
 Married Common-law Widowed Divorced Separated Single
12. Did your marital status change in 2022? Y N
If YES, what was it previously? _____ Date of change (month/day): _____
13. If married or common-law, please provide partner's information:
Name: First _____ Last _____
SIN: _____ Date of birth (YY/MM/DD): _____
(As above, if we processed your partner's tax return last year, then leave SIN and DOB blank)
Is your spouse or partner non-resident? Y N
Is your spouse or partner self-employed? Y N
Do you wish to create a linked spousal return (if your spouse's taxing province is BC)? Y N
If YES, do you authorize us to split your pension/RRIF with your spouse, if advantageous? Y N
If you do not wish to create a linked return, please provide the following details about your spouse's return:
His/her net income for 2022 (line 23600): _____
Amount of UCCB benefit (line 11700): _____
Amount of UCCB repayment (line 21300): _____
14. If this return is for a deceased person, please provide date of death (YY/MM/DD): _____
15. Is this a pre-bankruptcy return?
Date of bankruptcy (YY/MM/DD): _____
Amount of income after bankruptcy: _____
16. Did you reside within Nisga'a Lands on December 31, 2022? Y N
If YES, are you a citizen of the Nisga'a Nation? Y N
17. Do you have income in 2022 that is exempt under the Indian Act? Y N
If YES, we will let you know what additional information we require to complete form T90.

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18. Language of correspondence: *English or Français* E F
19. Did you own or hold **foreign property at any time** in 2022 with a total cost of more than CA\$100,000? Y N
20. Are you a Canadian citizen? Y N
If **YES**, do you authorize CRA to provide information about you to Elections Canada for purposes of updating the National Register of Electors? Y N
21. Do you have RRSP contribution receipts dated from Mar 2 to Dec 31, 2022 or Jan 1 to Mar 1, 2023? Y N
22. Did you make quarterly income tax instalment prepayments in 2022? Y N
If YES, how much? _____ (Provide receipts or CRA notice of payments)
23. Do you qualify for any of the following tax credits? *You must provide receipts. (Mark all that apply)*
- Medical Tax Credits and Disability Tax Credit (**must have a completed CRA form T2201**)
 - First-Time Home Buyer's Tax Credit (FTHBTC) or Home Buyer's Plan (HBP/RRSP)
 - Donations **and/or** Moving Expenses
 - Tuition and Education amounts (**must have form T2202 from the school**)
 - Employment Expense Deduction - if you had to buy your own tools, drive your own vehicle between work locations, buy gas for a company vehicle or were required to use your cell phone for work. (**must have receipts/mileage and completed form T2200 - Declaration of Conditions of Employment**)
24. Do you have children under 18 years of age (at Dec 31, 2022) living with you? *If YES, please provide name, date of birth and SIN (if applicable).* Y N
25. Did you support any relative over the age of 18 during the year, who was disabled and wholly or partially dependant on you? *If YES, please provide name, date of birth and SIN (if applicable).* Y N
26. Did you sell any shares, bonds, mutual funds or other investments? (Not through a financial advisor) Y N
27. Did you pay for any **medical insurance** (eg. extended health, dental, travel, etc) other than any amounts shown on a T4 slip? Y N
If YES, please provide receipts.
28. **Foreign Pensions:** Do you have income from foreign pensions? *If YES, which country?* _____
29. Did you sell your principal residence in 2022? Y N
If YES, please provide year originally purchased, complete address & postal code of the residence and the net proceeds of sale.
30. Did you pay for any qualifying Home Accessibility Expenses in 2022? *If unsure, please ask us.* Y N
31. Are you an eligible educator claiming the school supply tax credit? *If YES, please provide receipts.* Y N
32. Did you pay for any Digital News Subscriptions whose content is primarily original news and does NOT hold a broadcast licence? *If YES, please provide receipts.* Y N
33. Please provided us with your CRA T1 Notice of Assessment (NOA) from 2021.
(If we processed your 2021 tax return then we already have your NOA on file)
34. Do you authorize us to exchange information with CRA and/or use our office as your mailing address in the event of queries? Y N

My signature on the Tax Return or the T183 confirms that the terms, nature and scope of the engagement has been met, and further that, to the best of my knowledge, all the information disclosed in this questionnaire is complete and accurate. I authorize you to e-file my T1 Income Tax Return.

Signature

Date

Email address: _____