

Personal Tax Questionnaire

Date: _____

Name: _____

Address: _____

Phone Number(s): _____

Email(s): _____

Marital Status: _____

Children: _____

1. Did you sell your principal residence?

☐ Yes ☐ No

2. Have you sold any other property within the last year?

☐ Yes ☐ No

3. Do you own foreign investments costing more than \$100,000?

(excluding personal property ie. vacation home)

☐ Yes ☐ No

4. In which format would you like to receive/sign your 2024 Personal Tax Return?

☐ Printed/In Office ☐ Electronically/Client Portal

5. Are you waiting for any additional documents?

☐ Yes ☐ No Description: _____

6. Do you want your original tax records returned?

(If yes, please pick up before June 15th or the records will be shredded)

☐ Yes ☐ No

Signature: _____



Red Deer

#100 – 5218 50 Avenue
Red Deer, AB T4N 4B5
T: 403-343-7707
F: 403-343-7722

Trochu

320 Arena Avenue
Trochu, AB T0M 2C0
T: 403-442-3765
F: 403-343-7722

Didsbury

PO Box 2715
#121 – 1001 20 Avenue
Didsbury, AB T0M 0W0
T: 403-335-9167
F: 403-335-2336