



*Isherwood & Associates*  
Accounting & Tax

**Personal Tax Questionnaire - New Clients:**

**Date Received:** \_\_\_\_\_

**Personal:**

- 1) A. Name: \_\_\_\_\_  
B. Address: \_\_\_\_\_  
C. Telephone: Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Other: \_\_\_\_\_  
D. E-mail: \_\_\_\_\_ Did you reside within Nisga's Lands in 2025? Y\_\_\_ N\_\_\_
- 2) SIN \_\_\_\_\_ D.O.B. \_\_\_\_\_
- 3) Marital Status (Circle): Married Common Law Separated Divorced Widowed Single
- 4) Did your marital status change during this tax year? Y\_\_\_/N\_\_\_ Date of Change: \_\_\_\_\_
- 5) Separation Agreement is applicable? Y\_\_\_/N\_\_\_
- 6) Are you set up for Direct Deposit: Y\_\_\_/N\_\_\_ If No do you wish to be: Y\_\_\_/N\_\_\_ \* Encouraged\*
- 7) OK to share info with Elections Canada: Y\_\_\_/N\_\_\_ Province of residence as Dec 31, 2025: \_\_\_\_\_

**Income:**

- 8) Income and/or Investment Slips: T4's \_\_\_ T5's \_\_\_ T3's \_\_\_ OAS \_\_\_ CPP: \_\_\_ T5018's \_\_\_ T5007 \_\_\_
- 9) Self-Employed Business or Professional Income/Loss: Y\_\_\_/N\_\_\_ If YES See Checklist For SP
- 10) Did you have to pay for expenses as a condition of your employment (T2200): Y\_\_\_/N\_\_\_
- 11) Capital Gains: Y\_\_\_/N\_\_\_ If YES See Checklist For Capital Gains
- 12) Rental Income: Y\_\_\_/N\_\_\_ If YES See Checklist For Rental Income

**Investments:**

- 13) Do you own foreign property in excess of \$100,000 (Form T-1135)? Y\_\_\_/N\_\_\_
- 14) Any RRSP's: Y\_\_\_/N\_\_\_ Have you sold any non-registered investments Y\_\_\_/N\_\_\_
- 15) Have you purchased a new home in 2025 Y\_\_\_/N\_\_\_
- 16) Did you subscribe to a Home Buyers Plan: Y\_\_\_/N\_\_\_
- 17) Have you sold your principal residence in the year? If so please provide the following:
  - a) The original purchase document 'Buyers Statement of Adjustments'
  - b) The sale documentation 'Sellers Statement of Adjustments'
  - c) Was the home ever used as a rental-if so what dates, income, etc.

**Expenses:**

- 18) Children:
  - a) Name: \_\_\_\_\_ M/F: \_\_\_ Age: \_\_\_ DOB: \_\_\_/\_\_\_/\_\_\_
  - b) Name: \_\_\_\_\_ M/F: \_\_\_ Age: \_\_\_ DOB: \_\_\_/\_\_\_/\_\_\_
- 19) Daycare: Y\_\_\_/N\_\_\_ University/College Y\_\_\_/N\_\_\_
- 20) After School Programs: Y\_\_\_/N\_\_\_ Athletic/Arts Costs: Y\_\_\_/N\_\_\_ Transit/Bus: Y\_\_\_/N\_\_\_
- 21) Eligible Dependent (Equivalent to Married): Y\_\_\_/N\_\_\_
- 22) Children reside with both parents throughout the year Y\_\_\_/N\_\_\_ If NO, percentage to claim \_\_\_\_\_%

**Other Expenses:**

- 23) Moved in 2025 for work at least 40KM away: Y\_\_\_/N\_\_\_ If YES please provide the expenses & job information
- 24) Medical Expenses: Y\_\_\_/N\_\_\_ If Yes please provide the medical expenses
- 25) Have you done any home renovations for accessibility ie. Seniors or person with disabilities in 2025: Y\_\_\_/N\_\_\_
- 26) Donations: Y\_\_\_/N\_\_\_ If YES receipts required. Is this the first donation you've done on a tax return Y\_\_\_/N\_\_\_
- 27) Tuition: Y\_\_\_/N\_\_\_ If YES please provide the T2202A from the approved Institution
- 28) Are you a Teacher: Y\_\_\_/N\_\_\_ If so do you pay for your own school supplies?

**Other:**

- 29) Please provide at least one year of previous years' tax returns.
- 30) Please confirm you have online CRA access to your account Y\_\_\_/N\_\_\_ (required)

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[www.isherwoodaccounting.com](http://www.isherwoodaccounting.com)

*'With over 30 years experience it only makes common cents'*