

2009 T1 - General Client Questionnaire

Taxpayer - Identification			
First Name & Initials:	_____		
Last Name:	_____		
Social Insurance Number:	_____		
Birth Date (dd/mm/yy):	_____		
Present Address			
Address:	_____		
PO Box if appropriate:	_____		
City:	_____		
Province/Territory:	_____		
Postal Code:	_____		
Telephone & Email Contact			
Home Phone:	_____	Work Phone:	_____ Cellular Phone: _____
Email Address:	_____		
Residency Status			
Province or Territory of Residence on December 31, 2009:	_____		
Province or Territory of Residence at the current address (if different):	_____		
Moving Date if Within Canada:	_____		
On what date did you take up permanent residence in the territories? Prior to 2009 (yyyy): _____ or _____, 2009			
Do you maintain a house, apartment, condo, etc in the territories? (Y/N)	_____		
Are any other household members claiming the basic residency deduction? (Y/N)	_____		
If Yes, List Names and Dates Claimed			
<i>Name</i>	<i>Date</i>	to	<i>Date</i>
_____	_____	to	_____
_____	_____	to	_____
_____	_____	to	_____
_____	_____	to	_____
Spouse - Identification			
First Name & Initials:	_____		
Last Name:	_____		
Social Insurance Number:	_____		
Birth Date (dd/mm/yy):	_____		
Spouse's Address different from taxpayers? (Y/N)	_____		
Coupling: Taxpayer and spouse returns prepared together? (Y/N)	_____		
If No: Spouse's Net income from line 236 of the T1 return	_____		
Change of Marital Status in 2009 & Date if Applicable	_____, 2009		
Family Profile (Children & Dependants)			
	1	2	3
First Name & Initials:	_____	_____	_____
Last Name:	_____	_____	_____
Social Insurance Number:	_____	_____	_____
Birth Date (dd/mm/yy):	_____	_____	_____
Relationship:	_____	_____	_____
Lived with Taxpayer in 2008 (Y/N)	_____	_____	_____
Childcare expenses (Y/N)	_____	_____	_____
Tuition expenses (Y/N)	_____	_____	_____
	4	5	6
First Name & Initials:	_____	_____	_____
Last Name:	_____	_____	_____
Social Insurance Number:	_____	_____	_____
Birth Date (dd/mm/yy):	_____	_____	_____
Relationship:	_____	_____	_____
Lived with Taxpayer in 2009 (Y/N)	_____	_____	_____
Childcare expenses (Y/N)	_____	_____	_____
Tuition expenses (Y/N)	_____	_____	_____