

This questionnaire asks about events and actions which may impact your tax return.

What tax years does this questionnaire cover? \_\_\_\_\_

| QUESTIONS FOR ALL SITUATIONS  |        |                                      |
|---|--------|--------------------------------------|
| During the year(s) listed above, I...   | Answer | Further detail about this, if any... |
| Started a business  |        |                                      |
| Set up a corporation, a partnership or a trust                                |        |                                      |
| Sold a piece of real estate   |        |                                      |
| Moved to a new home, whether owned or rented                                  |        |                                      |
| Received corporate stock (shares) of my employer as part of my compensation   |        |                                      |
| Sold your ownership stake in a business (don't tick for stock market sales)   |        |                                      |
| Received money due to a lawsuit, settlement or court decision                 |        |                                      |
| Received cryptocurrency or non-fungible tokens as compensation for work       |        |                                      |
| Sold, gifted, exchanged, or disposed of cryptocurrency or non-fungible tokens |        |                                      |

| U.S. TAX RETURN CLIENTS ONLY  |        |  |
|---|--------|--|
| During the year(s) listed above, I...   | Answer |  |
| Made a loan/provided a mortgage to someone  |        |  |
| <b>Gave</b> money or a gift worth more than \$15,000 USD to someone               |        |  |
| <b>Received</b> a bequest, an inheritance or a gift worth more than \$100,000 USD |        |  |
| Set up a registered education or registered disability savings plan in Canada     |        |  |
| Received a new signing authority on another person's financial account            |        |  |
| Had a Canadian life insurance policy which had a cash surrender value             |        |  |
| Paid quarterly U.S. estimated tax/tax instalments                                 |        |  |
| Won money by gambling   |        |  |
| Received a government subsidy (premium tax credit) for U.S. health insurance      |        |  |

| CANADIAN TAX RETURN CLIENTS ONLY                                    |        |  |
|---|--------|--|
| During the year(s) listed above, I...                               | Answer |  |
| Paid quarterly Canadian tax instalments                             |        |  |
| Had a U.S. life insurance policy                                    |        |  |
| Have an interest in a U.S. Roth Individual Retirement Account (IRA) |        |  |