

We have filled in what we had on file from your 2025 return. Please confirm it is still accurate and correct anything that has changed. On page 2, tick each slip: have it, requested it, or no longer applies. If a slip is missing, request it from your employer, bank or investment manager.

1. Your Information

Full name Email

Cell phone Home phone

Are you a Canadian citizen? ☐ Yes ☐ No

Do you qualify for the Disability Tax Credit? ☐ Yes ☐ No

Do you have access to CRA My Account? ☐ Yes ☐ No

Do you receive (or want to receive) CRA mail online through My Account? ☐ Yes ☐ No

Preferred contact if we need more information: ☐ Phone ☐ Email

2. Changes in 2026

Did you move? ☐ Yes ☐ No If yes, new address Date of move

Marital status at Dec 31, 2026: ☐ Single ☐ Common-law ☐ Married ☐ Separated ☐ Divorced ☐ Widowed

Date status changed (if in 2026) Spouse's date of death (if applicable)

Did you pay spousal or child support? ☐ Yes ☐ No Amount paid in 2026 \$

3. Spouse or Common-law Partner (if applicable)

Full name Email

SIN Birth date Cell phone

Disability Tax Credit? ☐ Yes ☐ No Access to CRA My Account? ☐ Yes ☐ No

4. Dependants

Full name	SIN	Birth date	New in 2026	Post-secondary	Transfer tuition	Disability TC
			☐	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N
			☐	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N
			☐	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N

5. Residency and Property

Were you a resident of BC on December 31, 2026? ☐ Yes ☐ No If no, province/country

Are you a non-resident of Canada who owns residential property in Canada? ☐ Yes ☐ No

Did you or your immediate family hold foreign property costing over \$100,000 (cash, land, investments)? ☐ Yes ☐ No

Did you own an interest in a foreign affiliate at any time in 2026? ☐ Yes ☐ No

Have you added a child or other individual to the title of your home? ☐ Yes ☐ No

Do you own a residential rental property in partnership with others? ☐ Yes ☐ No

May CRA share your name, email and postal code with BC Transplant (organ donation info)? ☐ Yes ☐ No

6. Your 2025 Slips - Confirm for 2026

These slips were on your 2025 return. For each one, tick whether you have the 2026 slip, have requested it, or it no longer applies. If a slip is missing, request it from the issuer (your employer, bank or investment manager). Most slips are issued by the end of February; T3 and T5013 slips by the end of March. Many banks and brokers also post them in your online account.

Slip	Issued by (employer, bank, investment firm)	2025 amount	Have 2026 slip	Requested	No longer applies
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐
			☐	☐	☐

Blank rows: add any NEW 2026 slips (new job, new account, pension, EI, etc.).

7. Other 2026 Documents - Tick All You Have

- ☐ RRSP contribution receipts
- ☐ FHSA contributions
- ☐ Tuition slips (T2202)
- ☐ Medical / dental receipts
- ☐ Charitable donation receipts
- ☐ Childcare receipts
- ☐ Rent paid / property tax
- ☐ Moving expenses
- ☐ Self-employment income/expenses
- ☐ Rental income/expenses
- ☐ Sold a home or property
- ☐ Crypto or foreign income
- ☐ Tax instalments paid
- ☐ Union / professional dues
- ☐ Home office (T2200 from employer)
- ☐ Other (describe below)

Notes / anything else we should know

I confirm the information in this questionnaire is complete and correct, including my answer on foreign property.

Signature (type name) Date