



**Full Name:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_

**Cell phone number:** \_\_\_\_\_ **E-mail address:** \_\_\_\_\_

**Dependants** – if you welcomed any new children during the year, please provide their name, date of birth and SIN:  
\_\_\_\_\_

**Investment advisor** – if you work with an investment advisor, please provide their name and contact details below so that we can coordinate to ensure your tax return is complete.  
\_\_\_\_\_

**General questions - please check the appropriate box:** the following questions need to be answered on all tax returns.

Question	Yes	No
Are you a Canadian Citizen?		
Do you agree to Canada Revenue Agency providing your name, address, and date of birth to Elections Canada for the National Register of Electors?		
Do you have income that is exempt under the Indian Act?		
Do you authorize the CRA to provide your name and email address to Ontario Health to contact you regarding organ and tissue donation?		
Did you own foreign property at any time in 2025 with a total cost of more than \$100,00? <a href="#">CRA Foreign Property Definition</a>		
Has your mailing address changed during 2025? <i>If yes, please ensure the address entered on this form is your new and current address.</i>		
Did you sell or dispose of your principal residence this year or any other real property (cottage, vacation home, vacant land, etc.)? <i>If yes, please separately provide all details of the sale (year purchased, cost, proceeds on sale).</i>		

**Delivery of Completed Return** – please indicate how you’d like receive your completed tax return package for signature this year. *Please select one option:*

- A) Electronic signature and download through TaxFolder Portal (ensure cellphone and email are provided above)
- B) Mail with return envelope for signature documents required to file
- C) In-person pickup