

Name: _____

Address: _____

Phone Number(s): _____

Marital Status: _____

Dependent Children: _____

#1 Did you work from home this year due to COVID-19?

Yes No If **YES**, number of days _____
(must be for at least four consecutive weeks at home for more than 50% of your normal working days)

#2 Did you sell any property within the last year:

Yes No
If **YES**, please complete the following for property sold:
Street or legal address _____
Proceeds on disposition _____
Year property was purchased _____
Was this your principal residence for all the years owned?
 Yes No

#3 Did you own a residential property, in addition to your principal residence, during the year:

Yes No
If **YES**, was the property rented out during the year?
 Yes No

#4 Do you own foreign investments costing more than \$100,000

(excluding personal property ie vacation home)
 Yes No

#5 Preferred format in which you would like to receive your 2022 Personal Tax Return and documents for signature.

Via Client Portal Via Email Printed

#6 Preferred method of returning your records

Pick Up Mail Out