GREYWOOD
ADVISORY

CLIENT DOCUMENTS

CRYPTO & DIGITAL ASSETS

FORM GA-02 · ADDENDUM TO THE PERSONAL TAX INTAKE

Why we ask: the CRA requires one pooled cost base per coin across every platform you've ever used — and no single exchange can see the others. The more complete this page is, the faster and cheaper your reconciliation gets.

NAME

TAX YEAR

01 PLATFORMS & WALLETS

Every one you used — including closed accounts and old wallets

EXCHANGE / WALLET	TYPE (EXCHANGE, SELF-CUSTODY…)	APPROX. TRANSACTIONS	EXPORT AVAILABLE
			☐
			☐
			☐
			☐
			☐

02 ACTIVITY THIS YEAR

Check everything that happened

- ☐ Sold for dollars
- ☐ Staking rewards
- ☐ Airdrops or forks
- ☐ Paid in crypto for work
- ☐ Crypto-to-crypto swaps
- ☐ Lending / interest
- ☐ NFTs — mint, buy, sell
- ☐ Transfers between own wallets
- ☐ Spent or gifted crypto
- ☐ Mining
- ☐ DeFi — pools, yield, wrapping
- ☐ Other ____________

03 TOTAL VOLUME

- ☐ Under 100 transactions
- ☐ 100 – 1,000 transactions
- ☐ 1,000+ or DeFi-heavy

04 PRIOR YEARS

- ☐ All prior crypto activity has been reported
- ☐ Some years are unreported

Which years: ____________

- ☐ This is my first year in crypto

05 FOREIGN PLATFORMS

☐ My holdings on foreign exchanges may have crossed $100,000 CAD in total cost at some point in the year — we'll assess whether Form T1135 applies

06 NOTES

Lost access, closed exchanges, anything unusual