

PERSONAL TAX QUESTIONNAIRE

FORM GA-13 · COMPLETE ONE PER TAXPAYER

TAX YEAR THIS FORM COVERS

DATE COMPLETED

NEW OR RETURNING

New

Returning

01 ABOUT YOU

No SIN on this form — that one goes on the intake, GA-01

FULL LEGAL NAME

DATE OF BIRTH

PHONE

EMAIL ADDRESS

STREET ADDRESS

UNIT / APT

CITY

PROVINCE

POSTAL CODE

02 RESIDENCY & STATUS

Where you lived decides which province taxes you

PROVINCE YOU LIVED IN ON DECEMBER 31

IF YOU MOVED PROVINCES — DATE OF MOVE

IF YOU ENTERED OR LEFT CANADA — DATE

ANSWER FOR THE TAX YEAR ABOVE

YES

NO

Is this the first Canadian tax return you have filed?

Did you become a resident of Canada, or leave Canada, during the year?

Are you a Canadian citizen, and do you authorize the CRA to give your name to Elections Canada?

Do you authorize the CRA to give your name and email address to Ontario Health for the organ and tissue donor registry?

(this is not consent to donate — only to be contacted)

Are you filing on behalf of someone who died during the year?

03 MARITAL STATUS & SPOUSE

The CRA needs a spouse's income even when we prepare only your return

MARITAL STATUS ON DECEMBER 31

Single

Married

Common-law

Separated

Divorced

Widowed

SPOUSE OR PARTNER'S FULL LEGAL NAME

THEIR DATE OF BIRTH

THEIR NET INCOME FOR THE YEAR

IF YOUR STATUS CHANGED DURING THE YEAR — DATE OF CHANGE

Prepare our returns together — recommended; credits are optimized as a household

PERSONAL TAX QUESTIONNAIRE

FORM GA-13 · HOUSEHOLD & INCOME

04 DEPENDANTS

Children or others you support — they drive credits and benefits

FULL NAME	RELATIONSHIP	DATE OF BIRTH	LIVES WITH YOU	THEIR INCOME	IN SCHOOL / DISABILITY CREDIT

05 WHAT CHANGED THIS YEAR

Each one of these changes something on the return

- | | |
|---|--------------------------------------|
| Married, or moved in together | Separated or divorced |
| A child was born or adopted | A child moved out or finished school |
| Bought a home | Sold a home |
| Moved — 40 km or more, for work or school | Started a new job, or left one |
| Retired, or started drawing CPP / OAS | Started or closed a business |
| Went back to school | Someone in the family died |

06 INCOME SOURCES

Tick everything that applies — we will confirm the slips

- | | |
|--|--|
| Employment (T4) | Employment insurance (T4E) |
| Pension, scholarship, or contract work (T4A) | OAS / CPP benefits (T4A-OAS, T4A-P) |
| Interest or dividends (T5) | Trust or mutual fund income (T3) |
| Sold stocks or securities (T5008) | RRSP / RRIF withdrawals (T4RSP, T4RIF) |
| Self-employment or gig income — section 08 | Rental income — section 09 |
| Sold property or investments — section 10 | Crypto or digital assets — also Form GA-02 |
| Foreign income or pensions — section 11 | Spousal or child support received |
| WSIB or social assistance (T5007) | Other _____ |

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FORM GA-13 · WORK & BUSINESS

07 EMPLOYMENT

Skip if you had no T4 income this year

EMPLOYERS YOU WORKED FOR

HOW MANY T4 SLIPS DO YOU EXPECT?

ANSWER FOR THE TAX YEAR ABOVE

YES

NO

Did any of your pay come as commission?

 Did you work from home for part of the year?
 (a claim needs a signed T2200 from the employer)

Has an employer signed a T2200 or T2200S for you?

Did you receive tips or gratuities that are not on a T4?

Did you exercise or receive employee stock options?

Did you receive severance or a retiring allowance?

08 SELF-EMPLOYMENT & BUSINESS

Skip unless you ticked self-employment in section 06

BUSINESS OR OPERATING NAME

DATE THE BUSINESS STARTED

FISCAL YEAR END

WHAT THE BUSINESS DOES

APPROXIMATE GROSS REVENUE

HOW RECORDS ARE KEPT

ANSWER FOR THE TAX YEAR ABOVE

YES

NO

IF YES

Was this the first year of the business?

Are you registered for GST / HST?

Did you use a vehicle for the business?

Did you work from a space in your home?

Did you pay employees or subcontractors?

Column three: GST filing frequency (annual, quarterly, monthly) · business kilometres out of total kilometres driven · the share of your home used for work.

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FORM GA-13 · PROPERTY & INVESTMENTS

09 RENTAL PROPERTY

Skip unless you ticked rental income in section 06

ADDRESS OF THE PROPERTY	HOW MANY PROPERTIES		YOUR SHARE OF OWNERSHIP
ANSWER FOR THE TAX YEAR ABOVE	YES	NO	IF YES
Was this the first year the property was rented out?			
Did you or family use any part of it personally?			
Were there renovations, a new roof, or appliances bought? (these are claimed over time, not all at once)			
Did you sell a rental property during the year?			

10 INVESTMENTS & SALES

A T5008 shows what you sold for, not what you paid

ANSWER FOR THE TAX YEAR ABOVE	YES	NO	IF YES
Did you sell, switch, or transfer any investments?			
Do you have the original cost of what you sold?			
Can you send full annual statements, not only the slips?			
Did you sell real property — a home, land, or a cottage?			
Do you have capital losses carried forward from earlier years?			
Did you buy, sell, trade, stake, or spend crypto? (also complete Form GA-02)			

11 FOREIGN INCOME & PROPERTY

Cost, not market value, is what crosses the \$100,000 line

ANSWER FOR THE TAX YEAR ABOVE	YES	NO	IF YES
Did you own foreign property costing over \$100,000 CAD in total at any point? (includes crypto on foreign platforms — triggers Form T1135)			
Did you receive income from outside Canada?			
Was foreign tax withheld on any of it?			
Are you a US citizen or green card holder, or do you file a US return?			

PERSONAL TAX QUESTIONNAIRE

FORM GA-13 · SAVINGS & DEDUCTIONS

12 REGISTERED PLANS & YOUR HOME

RRSP contributions in the first 60 days count for either year

RRSP CONTRIBUTED DURING THE YEAR	RRSP CONTRIBUTED IN THE FIRST 60 DAYS AFTER	FHSA CONTRIBUTED		
ANSWER FOR THE TAX YEAR ABOVE	YES	NO	IF YES	
Do you know your RRSP contribution room, or have last year's notice?				
Do you have a Home Buyers' Plan or Lifelong Learning Plan balance to repay?				
Did you buy your first home?				
Did you sell a home that was your principal residence? (must be reported even when no tax is owed)				
Did you pay for accessibility renovations for a senior or a person with a disability?				

13 DEDUCTIONS & CREDITS

Tick what you paid for — receipts make them count

Childcare expenses	Medical or dental expenses
Charitable donations	Tuition (T2202)
Student loan interest	Union or professional dues
Employment expenses (T2200 from employer)	Home office
Spousal or child support paid	Disability tax credit (approved or applying)
Rent or property tax paid (Ontario Trillium Benefit)	Moving expenses
Supported a dependant with a disability	Digital news subscriptions
Other _____	
I have the receipts or totals ready to send	I still need to gather some of them

Not sure whether something counts? Tick it anyway, or note it on the next page — deciding what applies is our job, not yours. It is faster to rule something out than to discover it in April.

PERSONAL TAX QUESTIONNAIRE

FORM GA-13 · CRA & DECLARATION

14 THE CRA & PRIOR YEARS

What we need to know before we open your file

WHO PREPARED LAST YEAR'S RETURN	ANY YEARS STILL UNFILED		INSTALMENTS PAID THIS YEAR
ANSWER AS THINGS STAND TODAY	YES	NO	IF YES
Are you registered for CRA My Account?			
Is direct deposit set up with the CRA?			
Have you authorized us as your representative with the CRA?			
Do you have last year's Notice of Assessment?			
Did the CRA ask you to pay tax by instalments?			
Is there a review, an audit, or a letter from the CRA outstanding?			
Do you owe the CRA money, or have a payment arrangement?			

15 ANYTHING ELSE WE SHOULD KNOW

Plans for next year, worries, anything that does not fit above

16 DECLARATION

The answers on this form are true, correct, and complete to the best of my knowledge. I understand that Greywood Advisory will rely on them in preparing my personal income tax return, and that this form does not by itself authorize anything to be filed – the intake form (GA-01) and the CRA's electronic filing authorization (Form T183) are signed separately.

SIGNATURE

DATE

PRINTED NAME