

A8 Financial – Personal Tax Checklist

First Name:	Last Name:
Date of Birth:	Occupation:
Phone:	Email:
Current Address:	
Are you a Canadian citizen? No Yes If Yes, do you like to give your address to Election Canada? Yes No	
Did you immigrate to Canada in 2025? No Yes If Yes date entered Canada:	
Marital Status? Single Married Living Common-Law Divorced Widowed Separated If in 2025, what was the date?	
Did you have children living with you? No Yes If Yes, how many?	
Did you work in 2025? No Yes If Yes, how many employers?	
Did you have pension income in 2025? No Yes	
Did you have interest from banking accounts? No Yes	
Did you have investment income, like mutual funds? No Yes	
Did you have income from social benefits? No Yes	
Did you have scholarship? No Yes	
Are you disabled? No Yes If Yes, do you have a valid certificate? No Yes	
Do you own your home? No Yes	
Did you have income from other countries? No Yes	
Did you have properties in other countries? No Yes	
Did you have medical expenses? No Yes	
Did you make any donations? No Yes	
Did you have other sources of income? No Yes If Yes, please explain:	