



www.prosperitybusiness.ca

140-810 Central Avenue  
Saskatoon, SK S7N 2G6  
Tel: 306-934-6980  
Fax: 306-934-6981  
Email: info@prosperitybusiness.ca

## PROSPERITY BUSINESS SOLUTIONS INC.

### 2024 T1 CLIENT QUESTIONNAIRE AND CHECKLIST

Please complete and return to us with your tax information.

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#### TAX PAYER 1

Name: \_\_\_\_\_

Email: \_\_\_\_\_

SIN: \_\_\_\_\_

Telephone: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Canadian Citizen? Yes  No

May Canada Revenue Agency provide your name, address and SIN to Elections Canada to keep the voters list up-to-date? Yes  No

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**Marital Status:** Married  Single   
Living common-law  Separated  Divorced   
Widowed

Date of Status Change in 2024: \_\_\_\_\_  
(if applicable)

#### TAX PAYER 2 (Spouse/Partner)

Name: \_\_\_\_\_

Email: \_\_\_\_\_

SIN: \_\_\_\_\_

Telephone: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Canadian Citizen? Yes  No

May Canada Revenue Agency provide your name, address and SIN to Elections Canada to keep the voters list up-to-date? Yes  No

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**Current Address:** \_\_\_\_\_

Were you a First Time Home Buyer in 2024? Yes  No

Did you sell your Principal Residence in 2024? Yes  No

Address: \_\_\_\_\_

Year of Original Acquisition: \_\_\_\_\_ Proceeds of Disposition: \$ \_\_\_\_\_



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**Dependents:**

1. \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ SIN: \_\_\_\_\_  
Name DOB (yyyy/mm/dd)

2. \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ SIN: \_\_\_\_\_  
Name DOB (yyyy/mm/dd)

3. \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ SIN: \_\_\_\_\_  
Name DOB (yyyy/mm/dd)

4. \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ SIN: \_\_\_\_\_  
Name DOB (yyyy/mm/dd)

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**Foreign Income Verification Statement (T1135)**

Declaration

Please choose one of the following with regards to Foreign Property Held in 2024 (foreign property includes funds held outside of Canada, shares of foreign companies even if held in a Canadian brokerage account – not in an RRSP, loans to non-residents, interests in non-resident trusts, real estate outside of Canada – other than personal use real estate, and any other property held outside Canada):

- A. No – I did not have any foreign property with a total cost of more than \$100,000CAD at any point in 2024.
- B. Yes – I did have foreign property during 2024 with a total cost of more than \$100,000CAD. I will obtain the required information for Prosperity Business Solutions Inc. to prepare the form. I agree to pay any additional fees incurred to prepare the T1135 Form.
- C. Yes – I did have foreign property during 2024 with a total cost of more than \$100,000CAD. I will prepare and file the form myself and I am aware of the potential penalty applied by the CRA if the form is not filed by the filing deadline of my personal tax return. I understand that the form is due by April 30, 2025.

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Signature

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Date

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Signature

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Date