COAST MOUNTAIN ACCOUNTING

CPA CHARTERED PROFESSIONAL ACCOUNTANTS

6-1366 Aster Street, Pemberton, BC | Phone 778-887-4664 | coastmountainaccounting.com

Personal Tax Questionnaire

Please complete the fields below (click a field and type, or choose from the drop-down lists), save the file, and email it back to us. Fields marked with * are required on our online form.

How to return this form

Please email the completed form to info@coastmountainaccounting.com. Questions? Call 778-887-4664

Tax Year *
2026

First Name *

Last Name *

Date of Birth (mm/dd/yyyy) *

For your security, please do not enter your Social Insurance Number here. You can provide it through TaxFolder or by phone at 778-887-4664.

Street Address *

Mailing Address (if different)

City *

Province/Territory or State *
British Columbia

Postal Code *

Phone *

Email *

Are you registered for CRA My Account? *
No

Are you filing an income tax return with the CRA for the first time? *
No

Marital Status *
Select...

Did your marital status change in the tax year? *
No

Partners First Name (if applicable)

Partners Date of Birth (mm/dd/yyyy) (if applicable)

Number of dependants *
Select...

Are you a Canadian Citizen? *
Select...

Did you become a resident of Canada in the tax year? *
No

If yes, what date did you enter Canada? (mm/dd/yyyy)

Which Province/Territory did you live in on 31-Dec of the tax year? *
British Columbia

If you moved provinces, what date did you move?

Are you disabled? *

No

Did you own or hold specified foreign property (any foreign assets) at any time with a total cost of more than CAN$100,000? *

No

Did you dispose of a property (or properties) in the year for which you are claiming a principal residence exemption? *

No

Did you dispose of a housing unit (including a rental property, or rights to purchase a property) in the tax year? *

No

Self-Employed: Have you entered into an agreement with Service Canada to participate in the EI program for access to EI special benefits?

No

FHSA: Did you open a FHSA in the tax year? *

No

Additional Details / Message

Is there anything that changed since last year, such as a new job, marriage, a new baby, a sale of property, or a move?

Your information is kept confidential and used only to prepare your return.

When finished, save this file and email it to info@coastmountainaccounting.com.

Please do not include your SIN. Provide it through TaxFolder or call us at 778-887-4664.