

Personal Income Tax Questionnaire

1.

a) Are you disabled or are any of your dependants disabled? Provide Form T2201 - disability tax credit certificate. This also includes extensive therapy such as kidney dialysis and certain cystic fibrosis therapy. Also, the transfer rules include relatives such as parents, grandparents, child, grandchild, brothers, sisters, aunts, uncles, nephews or nieces.

b) Are you the caregiver for any infirm family members?

2. Do you want your tax refund or credit deposited directly to your account in a financial institution?

3. Do you have any personal interest expense - such as on a house mortgage or personal vehicle? If so, it may be possible to take steps to convert this into deductible interest. Please ask us for details.

4. Have you received the Universal Child Care Benefit of \$100 per month for each child under 6 years of age?

5. Are you a first-time home buyer in the previous year? A tax credit based on \$5,000 (@15% = \$750) is available for qualifying homes acquired after January 27, 2009.

6. Are you a U.S. citizen, Green Card Holder, or were you, or your parents born in the United States? You likely have U.S. filing obligations.

7. Have you spent more than 200 hours acting as a volunteer firefighter? You may be eligible for a Federal Tax Credit.

8. Are you an aboriginal person? Special tax rules may apply.

9. Do you have a Leveraged Insurance Annuity or "10/8" life insurance agreement?

10. Do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors? C. Additional Information