

FINANCIAL, INSURANCE, DONATIONS

INCOME TAX RETURNS	PERSONALLY FILED	LIFE INSURANCE	PERSONALLY		DONATIONS — Canadian —	PERSONALLY DONATED
	Past 12 Months		Carry	Acquired Past 2 Years		Past 12 Months
<p>YES <input type="checkbox"/></p> <p>NO <input type="checkbox"/></p> <p>WHO PREPARED RETURN:</p> <p>Personally Prepared</p> <p>—With Pen & Paper <input type="checkbox"/></p> <p>—With CD Computer Software</p> <p>—QuickTax <input type="checkbox"/></p> <p>—Ufile <input type="checkbox"/></p> <p>—H&R Block <input type="checkbox"/></p> <p>—Other <input type="checkbox"/></p> <p>—Online</p> <p>—QuickTax <input type="checkbox"/></p> <p>—Ufile <input type="checkbox"/></p> <p>—H&R Block <input type="checkbox"/></p> <p>—Other <input type="checkbox"/></p> <p>Friend or Relative <input type="checkbox"/></p> <p>Bookkeeper/Accountant <input type="checkbox"/></p> <p>H&R Block <input type="checkbox"/></p> <p>Liberty Tax <input type="checkbox"/></p> <p>CRA/Revenue Canada</p> <p>Volunteer Program <input type="checkbox"/></p> <p>Other Paid Tax Preparer <input type="checkbox"/></p> <p>TYPES:</p> <p>Debit Card <input type="checkbox"/></p> <p>Direct Deposit (Electronically) <input type="checkbox"/></p> <p>Discounted Return (Immediate</p> <p>Cash, Cash Back) <input type="checkbox"/></p> <p>Regular (Cheque Sent by</p> <p>CRA/Revenue Canada) <input type="checkbox"/></p> <p>METHOD OF FILING:</p> <p>Mailed Return <input type="checkbox"/></p> <p>Efile (By Efile Service Provider) <input type="checkbox"/></p> <p>Netfile (By Computer/Internet) <input type="checkbox"/></p> <p>Telefile (By Telephone) <input type="checkbox"/></p>		<p>ACQUIRED THROUGH:</p> <p>Agent/Broker <input type="checkbox"/> <input type="checkbox"/></p> <p>Bank/Trust Company <input type="checkbox"/> <input type="checkbox"/></p> <p>Financial Planner <input type="checkbox"/> <input type="checkbox"/></p> <p>Insurance Company <input type="checkbox"/> <input type="checkbox"/></p> <p>Professional/Alumni</p> <p>Association <input type="checkbox"/> <input type="checkbox"/></p> <p>Credit Card Offer <input type="checkbox"/> <input type="checkbox"/></p> <p>Place Of Employment <input type="checkbox"/> <input type="checkbox"/></p> <p>Full Service/Discount Broker <input type="checkbox"/> <input type="checkbox"/></p> <p>Other <input type="checkbox"/> <input type="checkbox"/></p> <p>COMPANIES:</p> <p>AIG Life <input type="checkbox"/> <input type="checkbox"/></p> <p>BMO Bank Of Montreal <input type="checkbox"/> <input type="checkbox"/></p> <p>Canada Life <input type="checkbox"/> <input type="checkbox"/></p> <p>CIBC Insurance <input type="checkbox"/> <input type="checkbox"/></p> <p>Clarica Life <input type="checkbox"/> <input type="checkbox"/></p> <p>Empire Life <input type="checkbox"/> <input type="checkbox"/></p> <p>Great West Life <input type="checkbox"/> <input type="checkbox"/></p> <p>Imperial Life <input type="checkbox"/> <input type="checkbox"/></p> <p>Industrial Alliance/ L'Industrielle-Alliance <input type="checkbox"/> <input type="checkbox"/></p> <p>Laurentian-Desjardins <input type="checkbox"/> <input type="checkbox"/></p> <p>London Life <input type="checkbox"/> <input type="checkbox"/></p> <p>Manulife Financial <input type="checkbox"/> <input type="checkbox"/></p> <p>Maritime Life <input type="checkbox"/> <input type="checkbox"/></p> <p>RBC Insurance <input type="checkbox"/> <input type="checkbox"/></p> <p>Royal Sun Alliance <input type="checkbox"/> <input type="checkbox"/></p> <p>Standard Life <input type="checkbox"/> <input type="checkbox"/></p> <p>Sun Life <input type="checkbox"/> <input type="checkbox"/></p> <p>TD Insurance <input type="checkbox"/> <input type="checkbox"/></p> <p>The Co-Operators <input type="checkbox"/> <input type="checkbox"/></p> <p>Transamerica <input type="checkbox"/> <input type="checkbox"/></p> <p>Other <input type="checkbox"/> <input type="checkbox"/></p>			<p>YES <input type="checkbox"/></p> <p>NO <input type="checkbox"/></p> <p>AMOUNT:</p> <p>Under \$50 <input type="checkbox"/></p> <p>\$51–\$100 <input type="checkbox"/></p> <p>\$101–\$200 <input type="checkbox"/></p> <p>\$201–\$500 <input type="checkbox"/></p> <p>\$501–\$1,000 <input type="checkbox"/></p> <p>\$1,001–\$5,000 <input type="checkbox"/></p> <p>\$5,001+ <input type="checkbox"/></p> <p>TYPES:</p> <p>Alumni <input type="checkbox"/></p> <p>Cultural <input type="checkbox"/></p> <p>Educational <input type="checkbox"/></p> <p>Environmental <input type="checkbox"/></p> <p>Hospital Foundations <input type="checkbox"/></p> <p>Political <input type="checkbox"/></p> <p>Religious <input type="checkbox"/></p> <p>ORGANIZATIONS:</p> <p>Alzheimer Society <input type="checkbox"/></p> <p>Arthritis Society <input type="checkbox"/></p> <p>Big Brothers/Sisters <input type="checkbox"/></p> <p>Cancer Society <input type="checkbox"/></p> <p>Children's Wish Foundation <input type="checkbox"/></p> <p>Diabetes Association <input type="checkbox"/></p> <p>Easter Seals <input type="checkbox"/></p> <p>Heart & Stroke Foundation <input type="checkbox"/></p> <p>Kidney Foundation <input type="checkbox"/></p> <p>Osteoporosis Society <input type="checkbox"/></p> <p>Salvation Army <input type="checkbox"/></p> <p>ShareLife <input type="checkbox"/></p> <p>United Jewish Appeal <input type="checkbox"/></p> <p>United Way of Canada <input type="checkbox"/></p>	
LIFE INSURANCE	PERSONALLY	HOMEOWNERS OR PERSONAL PROPERTY INSURANCE	PERSONALLY		DONATIONS — International Relief/ Development —	
	Carry		Carry	Acquired Past 2 Years	Past 12 Months	
<p>YES <input type="checkbox"/></p> <p>NO <input type="checkbox"/></p> <p>KIND:</p> <p>Group Life Insurance <input type="checkbox"/> <input type="checkbox"/></p> <p>Personal Life Insurance <input type="checkbox"/> <input type="checkbox"/></p> <p>TYPES:</p> <p>Whole Life <input type="checkbox"/> <input type="checkbox"/></p> <p>Universal Life <input type="checkbox"/> <input type="checkbox"/></p> <p>Term Insurance <input type="checkbox"/> <input type="checkbox"/></p> <p>Critical Illness <input type="checkbox"/> <input type="checkbox"/></p> <p>Long Term Care <input type="checkbox"/> <input type="checkbox"/></p> <p>FACE VALUE (PERSONAL LIFE INSURANCE):</p> <p>Less Than \$20,000 <input type="checkbox"/> <input type="checkbox"/></p> <p>\$20,000-\$49,999 <input type="checkbox"/> <input type="checkbox"/></p> <p>\$50,000-\$99,999 <input type="checkbox"/> <input type="checkbox"/></p> <p>\$100,000-\$249,999 <input type="checkbox"/> <input type="checkbox"/></p> <p>\$250,000-\$499,999 <input type="checkbox"/> <input type="checkbox"/></p> <p>\$500,000+ <input type="checkbox"/> <input type="checkbox"/></p>		<p>YES <input type="checkbox"/></p> <p>NO <input type="checkbox"/></p> <p>TYPES:</p> <p>Home <input type="checkbox"/> <input type="checkbox"/></p> <p>Condo <input type="checkbox"/> <input type="checkbox"/></p> <p>Personal Property/Contents <input type="checkbox"/> <input type="checkbox"/></p> <p>Vacation Property <input type="checkbox"/> <input type="checkbox"/></p> <p>ACQUIRED THROUGH:</p> <p>Agent/Broker <input type="checkbox"/> <input type="checkbox"/></p> <p>Bank/Trust Company <input type="checkbox"/> <input type="checkbox"/></p> <p>Insurance Company <input type="checkbox"/> <input type="checkbox"/></p> <p>Professional/Alumni</p> <p>Association <input type="checkbox"/> <input type="checkbox"/></p>			<p>YES <input type="checkbox"/></p> <p>NO <input type="checkbox"/></p> <p>AMOUNT:</p> <p>Under \$50 <input type="checkbox"/></p> <p>\$51–\$100 <input type="checkbox"/></p> <p>\$101–\$200 <input type="checkbox"/></p> <p>\$201–\$500 <input type="checkbox"/></p> <p>\$501–\$1,000 <input type="checkbox"/></p> <p>\$1,001–\$5,000 <input type="checkbox"/></p> <p>\$5,001+ <input type="checkbox"/></p>	
		PRIVATE HEALTH INSURANCE	PERSONALLY BOUGHT			
					Past 12 Months	
		<p>YES <input type="checkbox"/></p> <p>NO <input type="checkbox"/></p> <p>KINDS:</p> <p>Dental Insurance <input type="checkbox"/></p> <p>Disability <input type="checkbox"/></p> <p>Other <input type="checkbox"/></p>				