

If you are a new client , did you bring your latest tax return?	Yes	No
Did you bring your notices of assessment from the previous year?	Yes	No
Do you prefer that the language of printing the documents be French?	Yes	No
Have you made any donations?	Yes	No
<u>Direct deposit:</u>	Yes	No
Have you changed your bank account?	Yes	No

Do you want a hard copy? Yes No

Name: _____ Phone Number : _____
 Date of birth: _____ Cellphone : _____
 SIN : _____

Spouse : _____ Phone Number : _____
 Date of Birth: _____ Cellphone : _____
 SIN : _____

Have you changed your address? Yes No

Full address: _____

E-mail: _____

Child: _____	DOB: _____	Income _____ \$
Child: _____	DOB: _____	Income _____ \$
Child: _____	DOB: _____	Income _____ \$
Child: _____	DOB: _____	Income _____ \$

DOB (date of birth)

Marital status as at 31 December

Single Divorced Separated Married Common-law partner Widow Deceased

Date of death: _____

Involuntary separation Date: _____

Is it a new tax spouse? Yes No

Have you lived alone all year round? (Single person credit) Yes No

Date of change: _____

Have you informed Revenue Canada and the Ministère du revenu du Québec? Yes No

Have you sold a primary or secondary residence, land in 2023? Yes No

Have you co-signed for a home to help a loved one? Yes No

Did you send a letter by registered mail to Revenue Canada and Quebec? Yes No

Have you made a change of use or taken over a rented accommodation? Yes No

(Possibility of a penalty up to \$8000, sent letter+tp1079pn)

Health:		
Do you have group insurance for medication?	Yes	No
Do you have any fees for medicines, dentists, glasses, physio etc.?	Yes	No
Do you have adoption fees or infertility treatment?	Yes	No
Are you eligible for a disability tax credit?	Yes	No
Did you incur expenses for home accessibility	Yes	No
Are you eligible for the Caregiver Credit?	Yes	No

Do you have: Children	Yes	No
If <u>YES</u> answer the following questions		
Have you paid childcare fees?	Yes	No
Is it a \$9.10 daycare?	Yes	No
Have you received advance payments to pay for your private daycare?	Yes	No
Do you have expenses for children's sports or artistic activity?	Yes	No
Did you pay deductible or child support?	Yes	No
Have you incurred any legal fees?	Yes	No

Do you have: RRSP-Rap-Placement	Yes	No
If <u>YES</u> answer the following questions		
Do you hold more than \$100,000 in assets abroad? (Penalty \$2500)	Yes	No
Have you invested in RRSPs?	Yes	No
Have you invested in FHSA	Yes	No
Is the maximum allowed respected?	Yes	No
Have you raped for the purchase of a house? Amount _____ (You may be qualifying to rap to buy out your ex-spouse's share)	Yes	No
Is this your first home? Date _____	Yes	No
Is this your first home due to the death of your spouse?	Yes	No
Do you have investment income?	Yes	No
Have you realized a capital gain or loss?	Yes	No
Do you have any financial costs?	Yes	No

Do you have the: Post-secondary education	Yes	No
If <u>YES</u> answer the following questions		
Have you received a scholarship?	Yes	No
Have you removed REES?	Yes	No
Do you have tuition fees?	Yes	No
Do you have student loan interest?	Yes	No
Do you have unused tuition fees?	Yes	No
Do you transfer tuition fees?	Yes	No

Are you: Retired	Yes	No
If <u>YES</u> answer the following questions		
Have you extended your career following your pension? (60 years)	Yes	No
Do you want to split your retirement pension?	Yes	No
Are you entitled to the home support tax credit? (70 years)	Yes	No
Have you received early maintenance premiums (RL-19)?	Yes	No

Profession:

Have you incurred eligible expenses for school supplies? (teacher)	Yes	No
Are you a taxi driver?	Yes	No
Are you a volunteer firefighter?	Yes	No
Have you received your certificate of hours as a firefighter?	Yes	No
Do you have professional or union order fees?	Yes	No
Are you a construction employee? Have you bought any tools?	Yes	No
Have you moved to be closer to your workplace?	Yes	No
Will moving from the old to the new residence bring you at least 40 kilometers closer to your new workplace?	Yes	No
If so, what is the date of the move? _____		
Did you bring and compile your expenses?	Yes	No
Did you work from home for 4 consecutive weeks?		
At least 50% of the time for which your employer gave you a T2200 completed form?	Yes	No

Additional info

All information provided through this questionnaire is true.

Any omission of a document or disclosure of information may result in additional costs, filing delays and penalties with government authorities.

You must pay your invoice in order to receive your copies and results.

You must also sign authorization forms T183 and TP1000 to allow us to submit your tax returns via the Internet.

I read and understood the questions, otherwise the explanations were provided to me.

Signature of taxpayer 1

Signature of taxpayer 2

