

Required Form Personal Income Tax Return

We have created this new required form to accelerate the preparation process for your tax returns, covering recurring questions that apply to all our clients.

Please take a few minutes to answer the following questions and share any specific details about your situation in the "Comments" section.

Please note that, for efficiency reasons, we will not begin processing your tax returns until we have received the duly completed form.

	YOU	SPOUSE	CHILD 1	CHILD 2	CHILD 3
Complete name:	_____	_____	_____	_____	_____

PERSONAL INFORMATION

To be completed only if there were changes in 2024 and for new clients.

Address:	_____	_____	_____	_____	_____
City:	_____	_____	_____	_____	_____
Province:	_____	_____	_____	_____	_____
Postal code:	_____	_____	_____	_____	_____
Email address:	_____	_____	_____	_____	_____
Cell phone number:	_____	_____	_____	_____	_____
Date of birth (dd/mm/yyyy):	_____	_____	_____	_____	_____
Social insurance number:	_____	_____	_____	_____	_____
Marital status as of Dec. 31, 2023:	_____	_____			
Has your marital status changed during the year 2024?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No			
New marital status as of December 31, 2024, if applicable Date of change (dd/mm)	_____	_____			

Required Form (cont'd)

Personal Income Tax Return

2024

	YOU	SPOUSE	CHILD 1	CHILD 2	CHILD 3
NET INCOME OF YOUR SPOUSE					

To be completed only if there were changes in 2024 and for new clients.

Federal – Line 23600:		\$ _____			
Québec – Line 275:		\$ _____			

DIRECT DEPOSIT					
-----------------------	--	--	--	--	--

Are you registered for direct deposit?	<input type="radio"/> Yes <input type="radio"/> No				
Have your banking details changed in 2024?	<input type="radio"/> Yes <input type="radio"/> No				
Did you turn 18 in 2024?	<input type="radio"/> Yes <input type="radio"/> No				

Anyone turning 18 in 2024 must register for direct deposit to receive the Solidarity Tax Credit.
For any new registration or changes to banking information in 2024, please provide us with a void cheque.

YOUR PERSONAL SITUATION					
--------------------------------	--	--	--	--	--

At any time during the year, did you own foreign property with a total cost of more than \$100,000 CAD? <small>(If applicable, please provide "Foreign Property" schedule)</small>	<input type="radio"/> Yes <input type="radio"/> No				
Did you dispose of a principal residence, land or other property in 2024? <small>(If applicable, please provide details)</small>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No			
Did you change the use of a property in 2024? <small>(If applicable, please provide details)</small>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No			
Is the property changing from personal use to rental use?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No			
Is the property changing from rental use to personal use?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No			

Required Form (cont'd)

Personal Income Tax Return

2024

	YOU	SPOUSE	CHILD 1	CHILD 2	CHILD 3
YOUR PERSONAL INFORMATION (CONT'D)					
Did you attend a post-secondary school in 2024? <i>(If applicable, please provide us with the T2202 slip and the Relevé 8 for each institution. These documents usually need to be downloaded by the student from their school's website)</i>	<input type="radio"/> Yes <input type="radio"/> No				
Registered savings accounts <i>(please provide us with the receipts)</i>					
Did you open one or more FHSAs in 2024 and did not make any contributions, transfers or withdrawals?	<input type="radio"/> Yes <input type="radio"/> No				
Did you contribute to your FHSA in 2024?	<input type="radio"/> Yes <input type="radio"/> No				
Did you contribute to your RRSP between March 1 and December 31, 2024?	<input type="radio"/> Yes <input type="radio"/> No				
Did you contribute to your RRSP between January 1 and March 3, 2025?	<input type="radio"/> Yes <input type="radio"/> No				
QUÉBEC RESIDENTS ONLY					
Contribution to the Québec prescription drug insurance plan (RAMQ)					
Were you covered by a private or group insurance plan for prescription drugs for the entire year? <i>If you were covered by the RAMQ's plan, please answer "No".</i>	<input type="radio"/> Yes <input type="radio"/> No				
If you were covered for only part of the year, please provide the period of coverage (mm/dd):	from _____ to _____				

