

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:	<input type="text"/>				
Relationship to you:	<input type="text"/>				

PERSONAL INFORMATION

To be completed only if there were changes in 2025 and for new clients.

Address:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
City:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Province:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal code:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cell phone number:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth (dd/mm/yyyy):	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Social insurance number:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Marital status as of Dec. 31, 2024:					
Has your marital status changed in 2025?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No			
<input type="checkbox"/> New marital status as of December 31, 2025, if applicable <input type="checkbox"/> Date of change (dd/mm)	<input type="text"/>	<input type="text"/>			

Required Form (cont'd) Personal Income Tax Return

2025

NET INCOME OF YOUR SPOUSE

To be completed only if there were changes in 2025 and for new clients.

Federal – Line 23600:		\$ _____			
Québec – Line 275:		\$ _____			
Is your spouse self-employed?		<input type="radio"/> Yes <input type="radio"/> No			

DIRECT DEPOSIT

Are you registered for direct deposit?	<input type="radio"/> Yes <input type="radio"/> No				
Have your banking details changed in 2025?	<input type="radio"/> Yes <input type="radio"/> No				
Did your child turn 18 in 2025? <small style="color: #e74c3c;">If applicable, your child must be registered for direct deposit in order to receive the solidarity tax credit. Please provide a void cheque from their bank account.</small>			<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

For any new registration or changes to banking information in 2025, please provide us with a void cheque.

Please note that we can no longer complete the registration or make changes at the federal level. You will be required to do so yourself through 'My Account'.

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 style="color: #e74c3c;">(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 2025? <small style="color: #e74c3c;">(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 2025? <small style="color: #e74c3c;">(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

2025

YOUR PERSONAL INFORMATION (CONT'D)					
Did you attend a post-secondary school in 2025? <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 contribute to your RRSP between March 1 and December 31, 2025?	<input type="radio"/> Yes <input type="radio"/> No				
Did you contribute to your RRSP between March 1 and December 31, 2025?	<input type="radio"/> Yes <input type="radio"/> No				
Did you open one or more FHSAs in 2025 and did not make any contributions, transfers or withdrawals?	<input type="radio"/> Yes <input type="radio"/> No				
Did you contribute to your FHSA in 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 _____				

