

Name: _____

One form per person or family, answer all the questions.

	YES	NO	Reserved
● Are you a new client ? If yes, we need your 2023 tax report			
● On December 31st, 2024, in which province where you residing ?			
● Did you move in 2024 ? Was it to get closer to work or school ? (40km) If yes, please fill out the form T1-M, Moving Expenses Deduction	YES YES	NO NO	
● Did your marital status changed in 2024 ? If yes new status : _____ Date of the change : _____	YES	NO	
● Did you have a child in 2024 ?	YES	NO	
● If you are a tenant : provide your RL-31 If you are a home owner : provide your municipal tax statement	YES YES		
● Are you registered to Direct deposit? If not, provide a void check	YES		
● If you are between 65 and 72 years old, have you chosen not to contribute to the QPP/CPP?	YES	NO	
● Did you buy (or inherited) your first house 2024 ? Purchased date : _____ ** Please provide the first page of the notarized purchase act	YES	NO	
● Did you do a HBP or LLP ? (RRSP withdrawal for home buyer or return to school)	YES	NO	
● Did you buy RRSP/FHSA this year ? (Federal notice of assessment necessary) Are your RRSPs used to reimburse a HBP or LLP ?	YES YES	NO NO	
● Tuition or Training fees Do you have tuition or training fees for the year 2024? Do you wish to claim your children's tuition fees ? If yes, provide the T2202/RL-8 slip, or official receipt (available on omnivox or col.net) Are we doing your children income tax ? If not, provide his 2024 tax report, including the appendix 11, S&T	YES YES YES	NO NO NO	
● Are you admissible to employment expenses ? If yes, you have to fill out one of these forms : Employment expenses form Conditions of employment form T2200(S)/TP64 Meal expenses of long-haul drivers form TL2/TP66 Deduction for tools form TP75	YES	NO	
● Are you a teacher? Do you have supply expenses? If yes, please indicate the amount of these expenses _____	YES YES	NO NO	
● Is a member of your family Admissible to the disability tax credit (DTC) ? Are you an informal and family caregiver for a family member ? Relationship to you : _____ Disability : _____ (Person of 70 years old and more, disabled 18 years old and more)	YES YES	NO NO	

Name: _____

● Did you sell a vehicle or any other personal possession with a gain such as a car, RV, boat, art work etc. If yes, fill out the form Gain sale of personal-use property	YES	NO	
● Do you have rental income (condo, triplex...)? If yes, fill out the Rental Income form.	YES	NO	
● Did you <u>SELL</u> a property : primary or secondary residence or income property? If yes, fill out the Sale of property form (provide document requested)	YES	NO	
Was there a change of use ? (from primary property to income or vice-versa) If yes, which one : _____	YES	NO	
● Are you a self-employed worker or registered contractor? If yes, fill out the Business income form.	YES	NO	
Do you have GST/QST reports to produce ? If yes, provide the necessary documents	YES	NO	
● Did you sell any shares during the year? If yes , provide the broker's capital Gain/Loss table (T5008)	YES	NO	
● Are you making transactions in cryptocurrencies (Bitcoin)?	YES	NO	
● Do you have any childcare or sports expenses? Did you request advance payment of custody fees (RL 19 splip) ? If yes , provide the document . (RL 19 splip)	YES	NO	
● Seniors (70 years and over) Do you have expenses related to home maintenance ? If yes, fill out the form (Home support 70 years or over)	YES	NO	
● Do you have investments or assets over \$100,000,00 outside of Canada ? (T1135) (stock portfolio,condo Florida , etc .) Value of goods: _____ Address: _____	YES	NO	
● Are you acting as a nominee (counter-letter) ?	YES	NO	
● Is this the tax return of a deceased person? Please provide the following documents : Death certificate Testament (Will) Will search Did the deceased have one or more residences? Who is the executor: _____	YES	NO	

Other information:

Signature _____

Date _____