



# QUESTIONNAIRE

## Personal Taxes 2024

### IDENTIFICATION OF THE TAXPAYER \*

Name:	<input type="text"/>	First name:	<input type="text"/>
Address:	<input type="text"/>		
Gender:	<input type="text"/>	Birthdate:	<input type="text"/>
Phone number:	<input type="text"/>	Social insurance number:	<input type="text"/>
Civil status:	<input type="text"/>	E-mail:	<input type="text"/>

*\* If we have prepared your 2023 tax returns, please indicate only your name and any information that has changed in 2023 or 2024.*

### SPOUSE IDENTIFICATION

Name:	<input type="text"/>	First name:	<input type="text"/>
Gender:	<input type="text"/>	Birthdate:	<input type="text"/>
Phone number:	<input type="text"/>	Social insurance number:	<input type="text"/>
E-mail:	<input type="text"/>		

### IDENTIFICATION OF CHILDREN OR DEPENDENTS \*\*

Name:	<input type="text"/>	First name:	<input type="text"/>
Gender:	<input type="text"/>	Birthdate:	<input type="text"/>
E-mail:	<input type="text"/>	Social insurance number:	<input type="text"/>
Name:	<input type="text"/>	First name:	<input type="text"/>
Gender:	<input type="text"/>	Birthdate:	<input type="text"/>
E-mail:	<input type="text"/>	Social insurance number:	<input type="text"/>
Name:	<input type="text"/>	First name:	<input type="text"/>
Gender:	<input type="text"/>	Birthdate:	<input type="text"/>
E-mail:	<input type="text"/>	Social insurance number:	<input type="text"/>
Name:	<input type="text"/>	First name:	<input type="text"/>
Gender:	<input type="text"/>	Birthdate:	<input type="text"/>
E-mail:	<input type="text"/>	Social insurance number:	<input type="text"/>

*\*\* If you share custody of one of your children, please indicate the percentage of time you have custody of the child in addition to the child's net income.*

## OTHER INFORMATION TO PROVIDE

### Prescription drug insurance

Private      Public

Number of months of coverage:

**Paid medical expenses** (if you were covered by a private insurance plan, please provide the amount of premiums paid by you and not reimbursed by the insurance company)  \$

**Important dates to let us know about** (death of a family member, birth, immigration, emigration, etc.)

**Spouse's net income** (if we don't prepare his/her tax returns)

Federal :  \$      Québec :  \$

### Spousal transfer

In the event of a provincial tax refund, would you like us to transfer it to your spouse or vice versa to reduce his or her tax liability?

Yes      No

### Foreign investments and assets over \$100,000?

If, during the year, you owned or held foreign assets (rental property, investments, cash) costing more than CDN\$100,000, please provide us with the details. For investments, your financial advisor can provide you with the report so that we can prepare Schedule T1135.

### Cryptoasset

- Did you receive, hold or dispose of (sell, transfer, exchange, give, etc.) any cryptoassets during 2024?      Yes      No
- Did you hold cryptoassets at the end as of December 31<sup>st</sup>, 2024?      Yes      No
- Did you realize a capital gain (or loss), earn business income, earn rental income or earn interest income from cryptoassets?  
Yes      No

## DO YOU HAVE ANY ANNEXES TO FILL IN?

Complete the annexes that apply to your situation.

Self-employed earnings?	ANNEX A
Rental income?	ANNEX B
Car expenses for business or employment purposes?	ANNEX C
Gains & losses realized on non-RRSP investments (including cryptocurrency)?	ANNEX D
Purchase / sale of a residence?	ANNEX E
Payment or receipt of alimony?	ANNEX F
Eligibility for the Solidarity Tax Credit?	ANNEX G
American citizenship and long stays outside the country	ANNEX H

## CHECKLIST OF DOCUMENTS TO SEND US

We want to help you maximize your refund and get all the credits and deductions you're entitled to. To do so, be sure to send us all the documents we'll need to minimize your taxes. **Of course, you don't have to send us the slips prepared by our firm.** Here's a useful list:

Income <sup>1</sup>	
Copy of last year's tax return, if not prepared by LMK	Social assistance and workers' compensation benefits (T5007 / R5)
Copy of notices of assessment received for 2023 (federal & provincial)	Partnerships and tax shelters (T5013/T101/R15)
Employment (T4/T4A/Relevé1)	Capital gains and losses – see annex D
Taxable benefits and remuneration not shown on T4 and R1	Business or professional income and expenses - see annex A
Stock options	Rental income and expenses - see annex B
Universal Child Care Benefit (RC62)	Agricultural and fishing income and expenses
Employment insurance and parental insurance (T4E et R6)	Alimony - see annex F
Commissions	Non taxable items such as CNESST and guaranteed income supplement
Pension <sup>2</sup> / retiring allowance (T4A/R2)	RESP
Pension of RRQ/RPC/SV (T4A(P)/T4A(OAS)/R2)	RDSP
RRSP, RPDB, RPA, FERR (T4RSP/T4RIF/R2)	Scholarships and awards
Dividends (T5/R3)	Tax credit prepayments (Relevé 19)
Mutual funds, estates and trusts (T3/R16)	Other
Deductions and tax credits	
RRSP / Deductible employment expenses	Disabled person / Severe and prolonged impairment of mental or physical functions <sup>3</sup> / Maintaining an elderly person at home
Union and professional dues	Labor funds (5006/R10) / Minimum tax deferral
Childcare expenses	Amount for volunteer firefighters
Alimony - see annex F	Solidarity tax credit (see annex G)
Legal, accounting and investment advisor fees	Minimum HBP repayment
Interest paid for investment purposes	Minimum LLP repayment
Safety deposit box / Moving expenses	Adoption and infertility treatment expenses
Medical and attendant care expenses	Insurance premiums paid to a private prescription drug insurance plan
Tuition and exam fees, education amounts, interest - student loans	Deferral of investment expense adjustment (Québec)
Federal, provincial and municipal political contributions / Foreign taxes paid	Amount for informal and family caregivers / Person providing respite for informal caregivers / Respite expenses to help informal caregivers
Donations and amounts carried forward / Person living alone	Physical fitness and artistic activities for children
Experienced workers <sup>4</sup>	First-time homebuyer or home adapted for a disabled person
New graduates working in a remote resource region	Other

<sup>1</sup>It is the taxpayer's duty to ensure that he or she has received and provided us with slips and receipts for all income, credits and deductions. Some CEGEPs and universities, as well as some financial institutions (notably ING), make tax slips available on their websites without actually mailing them.

<sup>2</sup> Unless otherwise specified, we will split eligible retirement income with the spouse, if this is beneficial to the couple.

<sup>3</sup> Including products and services for people with disabilities, and expenses to renovate, convert or build a home.

<sup>4</sup> Individuals age 65 and over may be entitled to a non-refundable tax credit.