

# CLIENT FORM

## 2023 TAX RETURN

Client: \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ 2024

Mobile: (     ) \_\_\_\_\_ - \_\_\_\_\_

### SECTION #1

<p><b>Address:</b> _____  <b>Apt # :</b> _____  <b>S.I.N.:</b> _____  <b>D.O.B:</b> _____      <b>Gender</b>    F <input type="checkbox"/>    M <input type="checkbox"/>  <b>Other phone number (     )</b> _____ - _____  <b>e-mail:</b> _____</p>	<p><b>Spouse name:</b> _____                  If we don't file your partner's taxes:                  Line 23600 Federal : _____                  Line 275 Provincial : _____  <b>S.I.N.:</b> _____  <b>D.O.B:</b> _____  <b>Web site:</b> _____</p>																				
<p>Marital status on Dec. 31 2023 :    <input type="checkbox"/> Married    <input type="checkbox"/> Living common-law    <input type="checkbox"/> Single    <input type="checkbox"/> Widowed    <input type="checkbox"/> Separated    <input type="checkbox"/> Divorced                  Did your civil status changed in 2023: <input type="checkbox"/> Yes    <input type="checkbox"/> No      Date of change * : _____ / _____ / 2023  <i>* If separated, details of ex-spouse</i></p>																					
<p>Dependents information</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Child's name</th> <th style="text-align: left;">Date of birth</th> <th style="text-align: left;">Gender</th> <th style="text-align: left;">S.I.N.</th> <th style="text-align: left;">Post-secondary student</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>____/____/____</td> <td>F <input type="checkbox"/> M <input type="checkbox"/></td> <td>____ - ____ - ____</td> <td><input type="checkbox"/> Yes    <input type="checkbox"/> No</td> </tr> <tr> <td>_____</td> <td>____/____/____</td> <td>F <input type="checkbox"/> M <input type="checkbox"/></td> <td>____ - ____ - ____</td> <td><input type="checkbox"/> Yes    <input type="checkbox"/> No</td> </tr> <tr> <td>_____</td> <td>____/____/____</td> <td>F <input type="checkbox"/> M <input type="checkbox"/></td> <td>____ - ____ - ____</td> <td><input type="checkbox"/> Yes    <input type="checkbox"/> No</td> </tr> </tbody> </table>		Child's name	Date of birth	Gender	S.I.N.	Post-secondary student	_____	____/____/____	F <input type="checkbox"/> M <input type="checkbox"/>	____ - ____ - ____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____	____/____/____	F <input type="checkbox"/> M <input type="checkbox"/>	____ - ____ - ____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____	____/____/____	F <input type="checkbox"/> M <input type="checkbox"/>	____ - ____ - ____	<input type="checkbox"/> Yes <input type="checkbox"/> No
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<p>Do you have shared custody ?    <input type="checkbox"/> Yes    <input type="checkbox"/> No    →    If so, what % and for which children _____ %                  Which parent is liable to pay support payments?    <input type="checkbox"/> Dad    <input type="checkbox"/> Mom    <input type="checkbox"/> None</p>																					
<p>Insurance plan is covered by:    <input type="checkbox"/> Private ( <input type="checkbox"/> Own    <input type="checkbox"/> Spousal )    /    <input type="checkbox"/> RAMQ - months that it applies ? _____  <input type="checkbox"/> Extended Health benefit (for 65 y/o and over)</p>																					

### SECTION #2

<p>◦ Is this a tax return for a <b>deceased individual</b>? _____</p> <p>◦ If yes, what year did the death occur?    <input type="checkbox"/> 2023    <input type="checkbox"/> 2024</p>	<p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p>
<p>◦ Are you a <b>new client</b>? _____</p> <p>◦ If yes, who referred you? _____</p> <p>◦ Do you have an incorporated business? If yes, what is the name of the business? _____</p>	<p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p>
<p>◦ Are you <b>self-employed</b>? _____</p>	<p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p>
<p>◦ Do you have <b>employment expenses</b>? (T2200/TP-64.3 for home office, car expenses, etc.) _____</p>	<p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p>
<p>◦ Are you a <b>truck driver</b> claiming meal expenses? (TL2/TP-66) _____</p>	<p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p>
<p>◦ Do you have one or more <b>rental properties</b>? _____</p>	<p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p>
<p>◦ Have you <b>declared bankruptcy</b>? _____</p> <p>◦ If yes, in what year?    <input type="checkbox"/> 2023    <input type="checkbox"/> 2024</p>	<p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p>
<p>◦ Did you <b>dispose</b> of shares and/or mutual funds (<b>excluding RRSPs, excluding TFSAs</b>) during the year? _____</p>	<p><input type="checkbox"/> No    <input type="checkbox"/> No</p>

**Do you have any additional needs beyond accounting services?**

Mortgage renewal or negotiation? If yes, what is the renewal year \_\_\_\_\_

Life, critical illness, or disability insurance?

Financial planning?

Other: \_\_\_\_\_

**Note:** This request for information is for informational purposes only and aims to better understand your needs.



**CLIENT FORM**  
**2023 TAX RETURN**

**SECTION #3**

**Disposition or deemed disposition of a real property in 2023**

A real property includes a house, a land, a condo, a cottage, a mobile home, etc...

- Did you sell, transfer, or give away any real property in 2023 to a family member or a stranger?  Yes  No
  - If yes, had you owned this property for more than 365 days?  Yes  No
- Did you start renting out in 2023, to a family member or a stranger, a real property that you previously used for personal purposes?  Yes  No
- Did you start using for personal purposes in 2023 a real property that you were renting out to a family member or a stranger before that time?  Yes  No
- Did you grant an easement or a right of way on a land you owned to a family member or a stranger in 2023?  Yes  No

**General**

- Do you or a family member have a severe impairment or a disability?  Yes  No  
(if so, did you receive one of the form filled out and approved in 2023? ( T2201 / TP-752.0.14 )
- Are you a U.S. citizen ?  Yes  No
- Have you paid tax intallments?  Yes  No
  - If so, Federal : \_\_\_\_\_ \$ Provincial : \_\_\_\_\_ \$
- **Self-employed person** : if you have a GST and QST return to file , does it have to be filed by us ?  Yes  No
- Have you made a profit by selling a used vehicule ( or on a rental return) in 2023 ?  Yes  No

**Home assistance**

- Have you lived alone during the whole year of 2023 (Excluding dependent persons)?  Yes  No
- If you are a tenant or subtenant, did you receive a RL31 ?  Yes  No
- During 2023, have you moved to get closer to your place of work (more than 40km)?  Yes  No
- Have you contributed to your HBP (Home buyers plan) this year?  Yes  No
- Did you purchase a qualifying first home in 2023 ?  Yes  No
- Did you pay for home support services (disabled person or over 65 years old) ?  Yes  No
- Have you carried out renovation work to create a multi-generational house?  Yes  No

**Investments**

- Did you take any RRSP in 2023 or in the the first 60 days of 2024? (including monthly withdrawal)  Yes  No
- Did you own or hold specified foreign property where the total cost amount is more than CAN\$100K ?  Yes  No
- Have you received or transferred (sold, dispose,exchange,give,etc.) virtual money (ex:Bitcoin)  Yes  No
- Did you contribute to a FHSA in 2023? (2024 not eligible)  Yes  No

**Family**

- Are you a natural caregiver (form TP-1029.AN.A required if you aren't blood related) ?  Yes  No
- Have you incurred costs related to infertility treatment or for adoption ?  Yes  No
- Did you receive a children's Fitness Tax Credit/ children's art tax credit (child under 16)?  Yes  No

**70 years and more**

- If you are 70 y/o or more, did you pay for snowremoval, lawn and household ?  Yes  No
- Did you pay over \$250 for a hospital bed, an hearing aid or a wheelchair, etc.  Yes  No

**Please note that the basic fare for filing a 2023 tax return is 145\$/person plus taxes and an additional fee of 15\$/ person plus taxes for documents received after April 19<sup>th</sup>, 2024.**

How would you like to **sign** your documents and **receive** your statement?

- Paper : Please mail them to me (with a \$10 + tax fee)  Paper : Will pass by the office  Electronically "Onvio"

**If you have chosen to sign electronically via "Onvio",** how would you like to retrieve your original slips?

- Please mail them to me (with a \$10 + tax fee)  Will pass by the office  N/A: No paper slips provided

**Additional fees** will be charged if we are required to bring **corrections** to your tax return for any missing informations.

I hereby confirm the validity of the information and documents that I have given you and I assume responsibility of missing and/or incorrect information.

I am aware that I'm responsible for penalties incurred if not all my income is reported.

Client's signature \_\_\_\_\_ Date \_\_\_\_\_