

**Complete this form and return with your tax slips and receipts**

1. **If any of your personal information has changed from last year,** complete the section below:

Name:	
Address:	
Telephone:	Fax:
Email Address:	Birthdate:
Marital Status:	# of Dependents:

2. Did you or a dependent become disabled during the year? Yes/No  
 ➤ If so, have you filed the Disability Tax Credit application? Yes/No

3. Dependant information, including spouse, parent or grandparent:

Name	Relation	Date of Birth (dd/mm/yy)	SIN	Net Income

4. For adult dependants living with you, were they dependent on you due to an impairment in physical or mental functions? Yes/No

5. Do any of these items apply to you, if Yes please refer to our U.S. Checklist on our website:

- Were you or your parents born in the U.S.? Yes/No
- Are you a U.S. citizen or green card holder? Yes/No

6. If you resided in the United States during the year, how many days did you reside there? \_\_\_\_\_

7. Did you incur childcare expenses during the year? (nanny, daycare) Yes/No

- If Yes, please provide name, SIN and total salary including employer's portion of EI & CPP.

8. Did you pay or receive alimony or child support? If Yes, please complete table below

To whom	From whom	Amount Paid	SIN

9. Did you pay any income tax by instalments? Yes/No If yes, how much \$ \_\_\_\_\_

10. If you answer YES to any of the items below, please provide receipts and details:

- Did you contribute to the First Home Savings Account (FHSA) in 2023? Yes/No
- Did you pay for investment counselling or management fees? Yes/No
- Did you buy a home during the year? Yes/No
  - If yes, have you or your spouse lived in a home owned by either of you in the last five years? Yes/No
  - Was the home purchased to provide better accessibility for you or a relative that qualifies for the disability tax credit? Yes/No
- Did you make a charitable donation during the year? Yes/No

- Did you or your children move at least 40 km closer to your place of employment during the year? Yes/No
  - Did you adopt a child during the year? Yes/No
  - Did you receive income or incur expenses from any of the following: self-employment, rental income, commissions, farming, capital gains, or interest not reported on a tax slip? Yes/No
  - Did you pay tuition fees including fees paid to take an occupational, trade or professional examination during the year? Yes/No
  - Did you subscribe to a digital news service that was a Qualified Canadian Journalism Organization during the year? Yes/No
    - If yes, provide us with the receipt, the name of the organization and the amount paid for the stand-alone digital subscription
  - Did you incur medical expenses, including premiums paid to a group medical plan? Yes/No
  - Did you incur medical expenses to conceive a child during the year or in the last 10 years? Yes/No
  - If you are a teacher, did you purchase teaching supplies? Yes/No
  - If you are a tradesperson, did you purchase tools during the year? Yes/No
  - Did you pay property tax or rent during the year for your primary residence? Yes/No
    - If yes, how much rent \$ \_\_\_\_\_; how much property tax \$ \_\_\_\_\_
  - Did you make accessibility improvements to your residence during the year for the benefit of a family member, including yourself, that is 65 years or older or eligible for the disability tax credit? Yes/No
  - If you were employed during the year, were you required to work from home? Yes/No
    - If yes, provide us with form T2200 signed by your employer
11. Did you sell a residential property during the year? Yes/No
- If yes, please provide the complete property address, year of acquisition and sale proceeds.
  - If you and/or your spouse owned another property during the same period of ownership, please provide details.
12. Do you hold investments or mutual funds in a non-registered investment account? Yes/No
- If yes, please provide annual statements and trading summaries
13. Did you have any crypto-currency transactions during the year? Yes/No
- If yes, please provide details of the transactions
14. Did you exercise an employee stock option during the year? Yes/No
- If yes, please provide details of the transaction
15. Did you purchase a newly constructed property during the year? Yes/No
- If yes, is it your primary residence? Yes/No
  - If not your primary residence, is it a rental property? Yes/No
16. Do you own assets outside of the country? Yes/No
- If yes, please complete our foreign reporting questionnaire on our website
17. Do you have an In Trust For account for a parent/child/grandchild/minor? Yes/No
- If yes, you likely have a trust reporting requirement. Contact us for more details.
18. Do you wish to have Revenue Canada provide Elections Canada with your Name, Address, and Date of Birth from your personal tax return? Yes/No

19. Do you wish to have CRA provide Ontario Health with your Name and Email Address so that they may contact you regarding organ and tissue donation? Yes/No
20. Ensure that your direct deposit information with Canada Revenue Agency is correct.
  - Provide us with a void cheque if you would like us to prepare this request for you