



Please complete all sections where there have been change PLUS all mandatory (*) fields

TAXPAYER'S INFORMATION

* Name:

SIN:

Date of Birth:

MM/DD/YY

* Marital Status:

* Did your status change in 2024

Y N

Date of Change:

Are you a CANADIAN Citizen:

Y N

MM/DD/YY

SPOUSE'S INFORMATION

Name:

Date of Birth

SIN:

MM/DD/YY

Net Income (if filing separately): \$

DEPENDANT'S INFORMATION

Name:

M F

Date of Birth:

SIN #:

MM/DD/YY

Name:

M F

Date of Birth:

SIN #:

MM/DD/YY

Name:

M F

Date of Birth:

SIN #:

MM/DD/YY

CONTACT INFORMATION - New Clients please include phone number and email addresses below for taxpayer and spouse

Address:

*Tax Payers Phone/Cell:

City / Province:

*Tax Payers Email:

Postal Code:

*Spouse's Phone/Cell:

*Spouse's Email:



Please complete all questions in the following sections.

* PRINCIPAL RESIDENCE

Did you sell your principal residence during the year?	Y	N
IF YES: Sale Price: \$	_____	
Date of Purchase:	_____	
Has there been any change in the use of your principal residence? (ie. Rental)	Y	N

* OTHER INFO

Did you own foreign property at any time during the year that was worth more than \$100,000, including investments?	Y	N
Rental Income: (attach statement of rental income)	Y	N
Self Employed: (attach statement of business income)	Y	N
Do you hold any crypto assets?	Y	N

* TAX CREDITS / DEDUCTIONS

Charitable Donations:	Y	N
Child Care Expenses:	Y	N
Employment Expenses:	Y	N
(needs signed T2200 – attach automobile and home office schedules)		
Medical and Dental Expenses:	Y	N
Membership Dues:	Y	N
RRSP Contributions:	Y	N
Tuition Fees:	Y	N
Do you claim the disability amount?	Y	N
If yes, is this the first year that it is being claimed?	Y	N
Property Taxes / Rent Paid:	\$	
Income Tax Paid by installments:	\$	

* QUESTIONS TO ANSWER

Y N

- Did you receive **interest, dividends, or benefits** from a business in which a relative is a key party (in terms of ownership or involvement)?
- Are you **or any of your dependants disabled**? If so, provide Form T2201, Disability Tax Credit Certificate.

The **transfer rules** allow claims for certain dependent relatives. In addition, are you, or would you like to provide support to a disabled person? Tax planning opportunities may be available, such as the establishment of a Registered Disability Savings Plan. Persons with **disabilities** may also receive tax relief for the cost of **disability supports** (e.g. sign language services, talking textbooks, etc.) incurred for the purpose of **employment or education**. If you or your dependents are disabled but do not have a T2201 Form, please provide details so we can explore whether you are eligible for special credits or benefits.
- Are you the **caregiver** for any infirm family members? Did you provide **in-home care** for an infirm **dependent relative**?
- Did you provided **in-home care** for a **parent or grandparent** (including in-laws) 65 years of age or over, or an infirm dependent relative? A federal tax credit may be available. Certain provincial credits may also be available. Also, the caregiver may claim related **training costs** as a medical expense credit.



Y N

5. If you have **children up to the age of 17**, have you received **Canada Child Benefit (CCB)**?
6. Did you purchase a new home in 2024? If so, you may be eligible for the **residential property GST/HST rebate**. Also, are you a first-time **home buyer** in 2024? A federal tax credit based on \$10,000; may be available.
7. Are you a **U.S. citizen, Green Card Holder**, or were you, or your parents **born in the United States**? You may have U.S. filing obligations.
8. Have you spent more than 200 hours acting as a **volunteer firefighter** or a **search and rescue volunteer**? You may be eligible for a federal tax credit.
9. Are you an **aboriginal person**? Special tax rules may apply.
10. Do you authorize CRA to give your name, address, date of birth, and citizenship to **Elections Canada** to update the National Register of Electors?
11. Have you made any contributions to a **gifting tax shelter**?
12. Did you receive any **significant prizes or awards** from your, or a related person's place of employment?
13. Did you receive a retroactive **lump-sum payment** over \$3,000 (for example, spousal support)? In certain cases, some tax relief may be available.
14. Have you organized or managed a **crowdfunding campaign**? In some cases, there are tax implications.
15. **Other provincial and territorial tax credits** may be available in your jurisdiction such as certain property taxes and residential rent paid in Ontario.
16. **Do you have a will? When was it last updated?**
17. **Underused Housing Tax – New:** Do you own an interest on the title of a real property on behalf of a child, parent or other family member or through a private corporation? (Example: a 1% interest to facilitate financing?) If so, you may be required to file the new UHT-2900 Underused Housing Tax Return and Election form. Significant penalties apply for non-compliance.
18. **Do you authorize CRA** to provide to provide you name and email address to Ontario Health so that Ontario Health (Trillium of Life) may contact or send information to you about organ and tissue donation?
NOTE: you are **not** consenting to organ and tissue donation when you authorize CRA to share your contact information with Ontario Health. Your authorization is valid only in the tax year that you file return. Your information will only be collected under the Ontario Gift of Life Act.
19. Have you opened a new First Home Savings Account (FHSA)?