

2021 PERSONAL INCOME TAX

Full Name: _____ Date of birth: ____/____/____

Spouse full name, if applicable: _____

Tel.: Home: (____) _____ - _____ Office: (____) _____ - _____ Cell: (____) _____ - _____

Email: _____

- Did you **move** in 2021? Yes No
If « Yes », what is your new address?

- Has your « **Marital Status** » changed during 2021? Yes No
If « Yes », on what date: ____/____/2021 **and** what is you new « Marital Status »:

- Do you have a new « **Dependent Child** » that was born in 2021? Yes No
If « Yes », please provide his full name: _____ and date of birth: ____/____/____

FOR NEW CLIENTS ONLY

Dependant(s): child, father, mother, nephew, niece, etc.

Name	First name (Relationship)	Date of Birth	S.I.N.	Gross Annual Income	Deficiency
_____	_____	____/____/____	____/____/____	_____	Yes
_____	_____	____/____/____	____/____/____	_____	Yes
_____	_____	____/____/____	____/____/____	_____	Yes
_____	_____	____/____/____	____/____/____	_____	Yes

- Are your children participating to any « **physical or artistic activities** »? Yes No
If « Yes », please provide the **receipts**.

• **Have you provided us your « Notices of Assessment »** Yes No, and your «**2020 Income Tax Returns**»? Yes No

• Would you like to be listed on the electoral list? Yes No

• Were you living alone for the whole year (2021)? Yes No

• Do you have a **second citizenship**, other than Yes No If « Yes », which one? _____
Canadian

• **Do you have any foreign properties with their « Combined Initial Costs » in excess of \$ 100,000?** Yes No

• Do you have a « **Private Drug Insurance** »? Yes No. If « Yes », Participant: You Spouse
If « Yes », were you covered for the whole year (2021)? Yes No, If « No », start date ____/____/____ end date ____/____/____

• Have you purchased a « **First Home** » that is registered in the land registry in 2021? Yes No
If « Yes », were you and/or your spouse eligible for the « **HBP** » in 2021? Yes No

• **Did you sell your « Principal Residence » in 2021?** Yes No

• Do you want to split your « **Pension Income** » (RPP) with your spouse, if possible? Yes No

- Do you host or pay « **Parenting Support** » fee? Yes No
 If « **Yes** », what are his/hers coordinates? Date of Birth: _____ / _____ / _____ SIN: _____ / _____ / _____

- Do you have a child/children attending a « **Subsidized Daycare** »? Yes No
 If « **Yes** », you must provide us with the « **Relevé 30** » for each of them.

- Do you have a child/children attending « **CEGEP and / or University** »? Yes No
 If « **Yes** », provide the « **T2202 and Relevé 8 slips** » for each of them.

- Will « **School Fees** » be transferred to a parent? Yes No
 If « **Yes** », provide us with their « **2021 Tax Returns** » if we do not prepare theirs as well.

- Have you **reached age 70** in 2021? Yes No. Did you receive a « **Relevé 19** »? Yes No
 Did you incur « **Expenses** » for which there was no « **Request for Early Payment** »? Yes No
 « **Subsidy for Elders** »: You must provide us with a copy of your « **Municipal Tax Account** ».

- **As of December 31, 2021**: Were you the owner or tenant or roommate?
 • Did you receive a « **Relevé 31** »: Yes No
 If « **No** » did you receive a « **Municipal Tax Account** »: Yes No If « **Yes** », did you provide it: Yes No

- Does « **Porter Héту** » produce your Spouse's « **Tax Returns** »? Yes No
 If « **No** », what was his/her income in 2020 \$ _____ and in 2021 \$ _____

- Did you and/or your spouse contribute to your **RRSPs**? Yes No \$ _____ Spouse: Yes No \$ _____
 If « **Yes** » you and/or your spouse must provide us with all « **Supporting Documents** ».

- Do you have « **RRSP and/or Non-RRSP Investments** » on which « **Gains / Losses** » have been made? Yes No

- Have you made « **Provisional Installments** » in 2021? Yes No
 If « **Yes** », you must provide us with all « **Supporting Documents** » Yes No

- Would you like to register for « **Direct Deposit** »? Yes No
 If « **Yes** », is a « **Check Sample** » already on file? Yes No. If « **No** », provide one promptly.

- Did you receive **rental income like « Airbnb »**? Yes No

- **Are you one of the professionals** (accountants, lawyers, notaries, dentists, etc...) covered by the new rules on
 « **Work in Progress** »? Yes No

- Do you have any income (**Interest / Dividends**) from, directly or indirectly, a private corporation subject to the « **New Anti-Income Splitting Rules** »? Yes No
 If « **Yes** », does the income qualify for one of the exceptions in the Act? Yes No
 If « **Yes** », to which of these exceptions? _____
 If « **No** », what are the amounts of income subject to tax (T3 and/or T5)? \$ _____, \$ _____, \$ _____