

2018 PERSONAL INCOME TAX

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

Spouse full name, if applicable: _____

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

Email: _____

- Did you **move** in 2018? Yes No
If « Yes », what is your new address?

- Has your « **Marital Status** » changed during 2018? Yes No
If « Yes », on what date: ____/____/2018 **and** what is your new « Marital Status »:

- Do you have a new « **Dependent Child** » that was born in 2018? 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 « **2017 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 (2018)? Yes No

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

- **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 (2018)? Yes No, If « No », start date ____/____/____ end date ____/____/____

- Have you purchased a « **First Home** » that is registered in the land registry in 2018? Yes No
If « Yes », were you and/or your spouse eligible for the « **HBP** » in 2018? Yes No

- **Did you sell your « Principal Residence » in 2018?** Yes No

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

