

# 2019 PERSONAL INCOME TAX

Full Name: \_\_\_\_\_ Date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Spouse full name, if applicable: \_\_\_\_\_

Tel.: Home: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Office: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Email: \_\_\_\_\_

• Did you **move** in 2019? Yes No  
If « Yes », what is your new address?

• Has your « **Marital Status** » changed during 2019? Yes No  
If « Yes », on what date: \_\_\_\_/\_\_\_\_/2019 **and** what is your new « Marital Status »:

• Do you have a new « **Dependent Child** » that was born in 2019? 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 «**2018 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 (2019)? 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 (2019)? Yes No, If « No », start date \_\_\_\_/\_\_\_\_/\_\_\_\_ end date \_\_\_\_/\_\_\_\_/\_\_\_\_

• Have you purchased a « **First Home** » that is registered in the land registry in 2019? Yes No  
If « Yes », were you and/or your spouse eligible for the « **HBP** » in 2019? Yes No

• **Did you sell your « Principal Residence » in 2019?** Yes No

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

