

# 2020 PERSONAL INCOME TAX

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

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

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

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

- Did you **move** in 2020? Yes No  
If « Yes », what is your new address?

- Has your « **Marital Status** » changed during 2020? Yes No  
If « Yes », on what date: \_\_\_\_/\_\_\_\_/2020 **and** what is you new « Marital Status »:

- Do you have a new « **Dependent Child** » that was born in 2020? 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 «**2019 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 (2020)? 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** »?

If « Yes », were you covered for the whole year (2020)? Yes No. If « Yes », Participant: You Spouse  
Yes No, If « No », start date \_\_\_\_/\_\_\_\_/\_\_\_\_ end date \_\_\_\_/\_\_\_\_/\_\_\_\_

• Have you purchased a « **First Home** » that is registered in the land registry in 2020? Yes No

If « Yes », were you and/or your spouse eligible for the « **HBP** » in 2020? Yes No

• **Did you sell your « Principal Residence » in 2020?** 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 « **2020 Tax Returns** » if we do not prepare theirs as well.
  
- Have you **reached age 70** in 2020?      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, 2020:** 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 2019 \$ \_\_\_\_\_ and in 2020 \$ \_\_\_\_\_
- 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 2020?      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)? \$ \_\_\_\_\_, \$ \_\_\_\_\_, \$ \_\_\_\_\_