

**1. Client Information**

*Please fill out this section in full.*

Name **I want to receive my tax package and forms (required):**

Electronically  Paper (pick up)

Email (required) Preferred Contact Method Phone

Email  Phone

Mailing Address City Postal Code Province

Filing for Spouse? Spouse's Name Preferred Contact Method Phone

Yes  No  Email  Phone

Spouse's Email (required if filing for them) Filing for any dependants? If yes, please provide dependant name(s):

Yes  No

**2. Required Questions**

*Please answer all of the questions below and provide details as applicable. One sub-question has 'N/a' as an option, which means YES or NO is 'not applicable.'*

For a detailed review of income, tax deductions, and tax credits, see our [2023 Detailed Personal Tax Checklist](#)

Questions	Yes	No	Details
1. Did you or your spouse hold foreign income producing real estate, securities traded on a foreign stock exchange, foreign bank accounts, and/or foreign loans that had a cost greater than \$100,000 at any time during 2023?			
2. Did you sell your home in 2023 or 2024?			
3. Do you own any assets, property, or investments in your name for the benefit of someone else? See <a href="#">New Trust Reporting</a> .			
4. Are you on legal title, jointly or otherwise, for any Canadian residential properties that are not your principal residence, personal rental property or personal recreation property? (On title for estate reasons or financing reasons). See <a href="#">UHT Quick Reference Chart</a> .			
5. Any change to Canadian Citizenship in 2023? If yes, provide details.			
6. Any change in marital status in 2023? If YES, provide details and date of change.			
7. Did you have any new dependents in 2023? If yes, provide details.			
8. Did you create a secondary unit in your home for a senior or disabled family member? See <a href="#">MHRTC</a> .			
9. a) Did you open a First Home Savings Account in 2023? See <a href="#">FHSA</a>			
b) If you did open an FHSA, did you contribute to it in 2023?			N/a
10. Has your banking information changed in 2023? If YES, we will contact you for updated information.			
11. Have you provided us with all information that is needed to complete this tax return? If not, what is missing?			