

1. Client Information

Please fill out this section in full.

Name Birthdate (yyyy/mm/dd) **Please watch for an email from our iFirm portal**
 Follow instructions to sign up to your secure portal

Email (required) Preferred Contact Method Email Phone Phone **For what years are we preparing/filing tax returns?**

Mailing Address City Postal Code Province

Marital Status: Single Married Divorced Common Law Widowed Separated

Filing for spouse? Yes No Do you have any dependants? Yes No Filing for other family members? Yes No

Please fill out sections 2 to 4 based on your answers above. Then proceed to Page 2 and fill out Section 5, which is REQUIRED.

2. Spouse Information

Spouse's Name Birthdate (yyyy/mm/dd) Preferred Contact Method Email Phone Phone

Spouse's Email (required if filing for them)

3. Dependant Information

	Name	Birthdate (yyyy/mm/dd)	Are we preparing their return?			
			M	F	Yes	No
1.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Other Family Members Information

Only fill out this section if you want us to prepare/file returns for other family members (e.g., parents).

	Name	Birthdate (yyyy/mm/dd)	M	F	Relationship to you
1.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Please continue to the REQUIRED QUESTIONS on Page 2

5. Required Questions

Please answer all of the questions below and provide details as applicable. Some sub-questions have '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 (Text adjusts to fit space)
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 New Trust Reporting .			
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 UHT Quick Reference Chart .			
5. Are you a Canadian citizen? If NO, please provide your Canadian citizenship status.			
6. Any change in marital status in 2023? If YES, provide details and date of change.			
7. Did you create a secondary unit in your home for a senior or disabled family member? See MHRTC .			
8. a) Did you open a First Home Savings Account in 2023? See FHSA			
b) If you did open an FHSA, did you contribute to it in 2023?			N/a
9. Do you authorize the Canada Revenue Agency (CRA) to make your name available to update Elections Canada?			
10. Did you provide us with a copy of your prior year's tax return?			
11. a) Are you enrolled for Direct Deposit with CRA?			
b) If you are enrolled for Direct Deposit with CRA, has your banking information changed in 2023 or 2024?			N/a
c) If you are not enrolled for Direct Deposit with CRA, would you like to be? If YES, please provide us with your banking information.			N/a
12. Have you provided us with all information that is needed to complete this tax return? If not, what is missing?			