

Please Note:

**Our office is not accepting New Clients
until after May 15th, 2024**

**Our cutoff for guaranteed filing is
April 5th, 2024**

Name(s)	Email	Phone	Address

General Questions and Changes for 2023:

	YES	NO	Amount or Info		YES	NO	Amount or info
Turned 65 in 2023			n/a	Public Transit costs			
Multigenerational home renovations			New Deduction	Foreign property or investments > \$100,000			
Opened First Home Savings Account			New Contribution:	Tuition costs			Need T2202
Bought first time house			Date Bought:	Factual resident, Immigrant or Emigrant**			**See below**
Rent or Property tax (please indicate)				Donations			
Sold Principal Residence			Selling Price:	Medical expenses			
Did you have a child born in 2023?			Name and DOB:	Spousal or child support (circle one)			
Investment counsel fees				Moving expenses			
Employment expense			T2200 required	Rental Income and Expenses			Details enclosed
Business income and expense			Details enclosed	HST registrant			To be filed by us – circle Yes or No
Change of Marital status			Please inform	Are you a new client?			

Note: A “factual resident” is someone who keeps significant residential ties to Canada (i.e., own a home in Canada, or have a spouse/children living in Canada) while living or travelling outside of Canada (this travel can include working temporarily outside of Canada, teaching or attending school in another country, vacationing or living outside of Canada for part of the year). Even when outside of Canada, a factual resident is still considered a resident of Canada.