

**Please Note:**

**Our office is not accepting New Clients until after May 15<sup>th</sup>, 2025**

**Our cutoff date for guaranteed filing by the deadline is April 4<sup>th</sup>, 2025**

Due to the extended CRA deadline for filing T-slips, we will not begin preparing tax returns until March 15<sup>th</sup> to ensure efficiency with tax return preparation and avoid additional fees for our clients.

<b>Name(s)</b>	<b>Phone</b>
<b>Address</b>	<b>Email</b>

**General Questions and Changes for 2024:**

	YES	NO	Amount or Info		YES	NO	Amount or info
Turned 65 in 2024			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 (circle one)				Donations			
Sold Principal Residence			Selling Price:	Medical expenses			
Did you have a child born in 2024?			Name and DOB:	Do you pay or receive spousal or child support (circle one)			
Investment counsel fees				Moving expenses			
Employment expense			T2200 required	Do you have a rental property?			Short-term rental?  Non-compliant with municipal laws?
Business income and expense			Details enclosed	Are you required to file an HST return for self-employment income?			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.\*\*