**Personal Tax 2023**

**Simplified Pre-meeting questionnaire.**

Dear customers,

Some questions are essential for tax returns and must be confirmed annually.

Please complete only one questionnaire per family and send it to one of the following addresses:

[Yann.philibert@ypconsultantcpa.com](mailto:Yann.philibert@ypconsultantcpa.com) or [caroline.gagnon@ypconsultantcpa.com](mailto:caroline.gagnon@ypconsultantcpa.com)

|  |  |  |
| --- | --- | --- |
| Personnals informations | You | Spouse |
| Your name : |  |  |
| Your address:  (If you have moved*)* |  |  |
| Phone number:  (If you have changed your number*)* |  |  |
| Email address : |  |  |
| Check the way you want to receive communications from the CRA | Post  Email | Post  Email |
| Civil status as of 31/12/2023:  (If there has been a change during the year*)* |  |  |
| Have you been in jail for more than 90 days in 2023? | Yes  No | Yes  No |
| Have you resided more than 182 days outside the country in 2023? | Yes  No | Yes  No |
| Canadian residency status for tax purposes? | Canadian citizen  Permanent Resident  Non-resident | Canadian citizen  Permanent Resident  Non-resident |
| Did you sell your house or other important property in 2023? | Yes  No | Yes  No |
| Do you own foreign assets & investments worth more than CDN $100,000 (including USD investment in a Canadian portfolio excluding RRSP/TFSA) | Yes  No | Yes  No |
| Did you sell an investment in 2023 (in other account than an RRSP/ TFSA) | Yes  No | Yes  No |

|  |  |  |
| --- | --- | --- |
| Personnals informations | You | Spouse |
| Have you lived ‘’alone or alone with a minor child” throughout 2023? | Yes  No | Yes  No |
| If applicable, do you want to transfer your provincial tax refund to your spouse? | Yes  No | Yes  No |
| If you have annuity income, do you want to split your income between spouses? | Yes  No | Yes  No |
| What medical insurance are you covered with? | Private insurance  Spouse’s private insurance  RAMQ all year round  RAMQ a period of year  (Please indicate months covered by RAMQ) | Private insurance  Spouse’s private insurance  RAMQ all year round  RAMQ a period of year  (Please indicate months covered by RAMQ) |
| Did you make tax installment payments in 2023? (Payment date, amount, Federal or Provincial deposit) | Yes  No | Yes  No |
| Did you telework in 2023?  If so, you wish to deduct home office expenses? | Detailed method  (Please provide form T2200, T2200S and TP64.3) | Detailed method  (Please provide form T2200, T2200S and TP64.3) |
| Name of newborns and their date of birth in 2023 |  |  |
| Do you have shared or full custody of your children? (For children 18 and under as of Dec. 31, 2023) |  |  |
| How would you like your tax returns to be delivered to you? | Paper version  PDF version | Paper version  PDF version |
| Would you like to have a meeting for explanations on your taxes when you receive them? | Yes, I want to have a meeting.  No meeting required. | |

**\*\* Checklist: Consult our website for the list of documents to bring during your visit.**