**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 or 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.**