

Taxpayer: \_\_\_\_\_

*Please complete each highlighted section*

## Direct Deposit (Mandatory for Solidarity Tax Credit)

Do you wish to register for direct deposit? If yes, please provide a blank cheque marked "Void".  
If already registered, please inform us of any change during the year.

Yes  No  
 Already provided  
 Change

## Communication by e-mail

Next year, would you like to receive your income tax documents by e-mail?

Yes  No

Would you like to register to the online mail service offered by the government agencies?

Yes  No

If yes, please enter your email address: \_\_\_\_\_

Already  
registered

(You will need to collect your notices provided by the government agencies in your secured account.)

## Elections Canada

If you are a Canadian citizen, do you authorize the Canada Revenue Agency to provide your name, address and date of birth to Elections Canada to update your information on the National Register of Electors? (If not specified, the information provided last year will be used again).

Yes  No

## Foreign Income (Mandatory Form)

Did you own or hold foreign property at any time in 2022 with a total cost of more than CAN \$ 100,000? Complete, sign and return form T-1135 (attached).

**Complete and  
sign Form  
T-1135 attached**

## Income Splitting

To split pension income between spouses, both the pensioner and the spouse must make a joint election. If you receive eligible pension income and income splitting would be advantageous for both of you, do you, as one of the spouses, accept to take advantage of this option? (If yes, we will contact you if these measures apply to you and benefit your tax situation.)

Yes  No

## Virtual currency

Did you receive or dispose (sale, transfer, exchange, gift, etc.) virtual currency?

Yes  No

If yes, provide details.

## Beneficiary of a designated trust (Quebec Resident)

In 2022, were you a beneficiary of a trust resident in Canada, outside Quebec, with a monetary value interest totaling \$5,000 or more, or more than 10% of the capital interest? (If yes, we will contact you to obtain additional information.)

Yes  No

## Electronic Filing

I authorize Desjardins Securities Financial Services Inc. to **electronically file my tax return** providing I meet the eligibility requirement.

A copy of your tax returns will be sent to you for your file with all your tax documents; **please indicate your preference:**

Call me at (\_\_\_\_) \_\_\_\_\_ to discuss how documents will be returned

Send envelope by mail  to home address or  to company address

Send envelope by courier (at my cost)  to my company address or  to my home address

Client signature: \_\_\_\_\_ Date: \_\_\_\_\_