

**SECTION 1 - CHECKLIST PERSONAL INCOME TAX 2022**

SELF	SPOUSE
<p>Name <span style="float:right; font-size: small;">First name      Initials      Last name</span></p> <p>S.I.N.</p> <p>DATE OF BIRTH (day/month/year)</p> <p>TELEPHONE</p> <p>E-MAIL</p> <p>DATE OF DEATH (day/month/year)</p>	<p>Name <span style="float:right; font-size: small;">First name      Initials      Last name</span></p> <p>S.I.N.</p> <p>DATE OF BIRTH (day/month/year)</p> <p>TELEPHONE</p> <p>E-MAIL</p> <p>DATE OF DEATH (day/month/year)</p>

**MARITAL STATUS AS AT DECEMBER 31, 2022**

If changed during 2022, please give exact date (day/month/year): \_\_\_\_\_

Lived alone or lived with a person under 18 in a domestic establishment during all of 2022? YES  NO

Single       Separated       Common-Law spouse   
 Married       Divorced       Common-Law spouse (same sex)   
 Widowed

Do we prepare your spouse's income tax returns ? YES \_\_\_\_\_ NO \_\_\_\_\_

If not, please provide Net income : Federal (Line 23600) \$ \_\_\_\_\_ Quebec (Line 275) \$ \_\_\_\_\_

**CHILDREN AND RELATIVES WHO WERE DEPENDENTS IN 2022**

If we produced their returns last year, please indicate any changes that occurred in 2022.

NAME			
DATE OF BIRTH (Day/month/year)	_____	_____	_____
S.I.N.	_____	_____	_____
TUITION FEES (T2202/R8)	_____	_____	_____
DISABLED (YES/NO)	_____	_____	_____
PREPARING THEIR RETURNS	YES _____ NO _____	YES _____ NO _____	YES _____ NO _____
IF not, Net income	Federal : Line 23600 \$ _____	Line 23600 \$ _____	Line 23600 \$ _____
	Quebec : Line 275 \$ _____	Line 275 \$ _____	Line 275 \$ _____

**QUEBEC PRESCRIPTION DRUG INSURANCE PLAN (RAMQ)**

	SELF	SPOUSE	DEPENDENTS
Were you covered by a drug insurance plan offered by your employer, professional association or insurance company during 2022?	YES <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If yes, number of months covered : _____	NO <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Specify the months: _____		
In 2022, were you part of a complementary drug insurance plan, RAMQ being the first payor?	YES <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	NO <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**RESIDENCE**

	SELF	SPOUSE	DEPENDENTS
Province of Residence as of December 31, 2022?	Quebec <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If other province, please specify which one?	Ontario <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you a citizen of another country? If yes, specify.	_____	_____	_____
<b>TIES WITH UNITED STATES OF AMERICA *</b>			
Number of days spent in the U.S.A. in:			
(Specify number of days)			
2020	_____	_____	_____
2021	_____	_____	_____
2022	_____	_____	_____

\* If more than 31 consecutive days spent in U.S.A. in 2022.

## SECTION 2 - CHECKLIST INCOME TAX 2022

INCOME		SENT NOT LATER THAN:	SLIPS/RECEIPTS		SELF	SPOUSE	DEPENDENTS
			FEDERAL	QUEBEC			
<input type="checkbox"/>	Salary	Feb. 28, 2023	T4	Rel 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employee Profit Sharing Plan	Feb. 28, 2023	T4PS	Rel 25	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Stock options exercised	Feb. 28, 2023	T4	Rel 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Other employment income	Feb. 28, 2023	T4/T4A	Rel 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Pension adjustment reversal (PAR)		T10		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Employment Insurance benefits	Feb. 28, 2023	T4E	Rel 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Old age security pension	Feb. 28, 2023	T4A(OAS)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Canada / Quebec pension	Feb. 28, 2023	T4A (P)	Rel 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Other Pension Income	Feb. 28, 2023	T4A	Rel 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	RRSP Withdrawals	Feb. 28, 2023	T4RSP	Rel 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	RRIF Withdrawals	Feb. 28, 2023	T4RIF	Rel 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Dividends/Interest (\$50 or more)	Feb. 28, 2023	T5	Rel 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Dividends/Interest (less than \$50)		Provide details		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Refund interest on prior year's tax returns		Notice of Assessment		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Interest on CSB's/QSB's	Feb. 28, 2023	T5	Rel 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Redemption of CSB's/QSB's (if applicable)	Feb. 28, 2023	T600	Rel 13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Trust income	March 31, 2023	T3	Rel 16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Mutual funds income distribution	March 31, 2023	T3	Rel 16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Net partnership income	March 31, 2023	T5013	Rel 15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Subsidies (Quebec Gov.)	Feb. 28, 2023		Rel 27	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	COVID-19 benefits (or repayment)	Feb. 28, 2023	T4A	Rel 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Bursaries, Grants, Death Benefits, allowance	Feb. 28 / March 31	T4/T4A/T3	Rel 1, 16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Advance payments of tax credits* (page 4)	Feb. 28, 2023	n/a	Rel 19	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Other income (RESP, RDSP, LLP, CNESST, etc.)		Provide details		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Capital gains	Feb. 28, 2023	T5008	Rel 18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<b>Disposition of your virtual currency</b>		Provide details				
<input type="checkbox"/>	Disposition of your residence (if applicable, mandatory)						See Appendix 1
<input type="checkbox"/>	Rental income (statement of income and expenses)						See Appendix 1
<input type="checkbox"/>	Self-employment income (including farming income)		Provide details				See Appendix 2
<input type="checkbox"/>	Alimony received :	Amount received \$ _____	Provide details				
		Taxable amount \$ _____					
<input type="checkbox"/>	Foreign income				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Interest, dividends from U.S.A. (paid to a non-resident of USA)	March 15, 2023	FORM 1042S		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Interest, dividends from U.S.A. (Paid to a US citizen or Green card holder)	January 31, 2023	FORM 1099 INT, DIV		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Capital gains from U.S. citizen	January 31, 2023	1099 B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DEDUCTIONS		SENT NOT LATER THAN:	SLIPS/RECEIPTS		SELF	SPOUSE	DEPENDENTS
			FEDERAL	QUEBEC			
<input type="checkbox"/>	RRSP (contributions made between March 2 and Dec 31, 2022)	Generally, receipts sent beginning of January			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	RRSP (contributions made between Jan. 1, and Feb. 1, 2023)	Generally, receipts sent mid-February			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	RRSP (contributions made between Feb. 2, and March 1, 2023)	Generally, receipts sent 10 working days after cont.			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Union or Professional dues		Receipts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Attendant care expenses		Receipts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Unreimbursed moving expenses		Receipts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Investment loan interest		Receipts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Investment carrying charges (Counselling, QSSP fee etc.)		Receipts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Tax shelters (Partnership, R&D, Film, Oil & Gas)		T101/T5013	Rel 11, 15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Quebec Tax Shelters ( CIP)			Rel 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Other employment expenses (home office, car, labour mobility)		T2200	TP-64.3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Working from home due to COVID-19		Receipts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Child care expenses		Receipts	Rel 24	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Name of child		- S.I.N.				
<input type="checkbox"/>	- Amount paid	\$ _____					
<input type="checkbox"/>	Alimony paid		Receipts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	- Name of beneficiary		- S.I.N.				
<input type="checkbox"/>	- Amount paid	\$ _____					

## SECTION 3 - CHECKLIST INCOME TAX 2022

CREDITS	SLIPS/RECEIPTS		SELF	SPOUSE	DEPENDENTS
	FEDERAL	QUEBEC			
<input type="checkbox"/> Tuition fees	T2202	Rel 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Disability (Certified on prescribed form by a qualified practitioner)	T2201	TP752.0.14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Labour-Sponsored venture capital funds investment	T5006	Rel 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Recognition of Volunteer Respite Services		Rel 23	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Capital régional et coopératif Desjardins Shares		Rel 26	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <b>Unreimbursed eligible medical expenses</b>		Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Charitable donations (incl. registered journalism organizations)		Receipts with registration #	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Federal political contributions/Quebec municipal parties		Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Loan interest for student loan		Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Children's fitness and arts amount	n/a	Receipts			<input type="checkbox"/>
<input type="checkbox"/> Seniors' activities	n/a	Receipts			<input type="checkbox"/>
<input type="checkbox"/> Alternative Minimum Tax Carryforward			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <b>Premium paid for private health service plan</b>	\$ _____		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Treatment of infertility	Receipts	TP1029.8.66.2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Adoption fees	Receipts	TP1029.8.63	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <b>Home-Support Services for Seniors</b>		TPZ1029.MD.5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Independent living tax credit for seniors	n/a	Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> <b>Advance payments of tax credits</b>		Rel 19	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(respecting work premium, child-care expenses or home-support services for seniors)					
<input type="checkbox"/> Purchase of a first home and Home Buyer's Plan (HBP)	Details	Details	Please provide details		
<input type="checkbox"/> Digital news subscription expenses	Receipts	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Eligible educator school supplies	Receipts	n/a	Please provide details		
<input type="checkbox"/> <b>Home accessibility expenses</b> (older than 65 and/ or disabled)	Receipts	n/a	Please provide details		
<input type="checkbox"/> Grant for seniors to offset a municipal tax increase		TP-1029.TM-V	Municipal tax bill		
<input type="checkbox"/> <b>Solidarity tax credit</b>	n/a	Rel 31	or Municipal tax bill		
<input type="checkbox"/> Tax credit for caregivers	n/a	Documents	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Canadian caregiver amount	Documents	n/a	<input type="checkbox"/>	<input type="checkbox"/>	

## SECTION 4 - CHECKLIST INCOME TAX 2022

TAX PAID IN 2022	SELF	SPOUSE	DEPENDENTS
<input type="checkbox"/> TOTAL <u>CANADA</u> INCOME TAX INSTALMENTS PAID			
FEDERAL \$ _____		\$ _____	\$ _____
PROVINCIAL \$ _____		\$ _____	\$ _____
<input type="checkbox"/> TOTAL <u>U.S.A.</u> INCOME TAX INSTALMENTS PAID			
United States (Federal) \$ _____		\$ _____	\$ _____
States of U.S.A. \$ _____		\$ _____	\$ _____
<input type="checkbox"/> Provide 2021 Notice of Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Other correspondence received from tax authorities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Thank you for organizing your tax information for us. The completeness and accuracy of your tax returns depend on the information you provide to us.

**PLEASE  
RETURN THIS QUESTIONNAIRE AND ALL DOCUMENTS TO US WHEN COMPLETE  
PLEASE DO NOT SEPARATE YOUR TAX SLIPS  
FILL OUT APPENDIX 1 AND/OR 2, IF APPLICABLE  
THANK YOU**

APPENDIX 1

STATEMENT OF DISPOSITIONS DURING 2022<sup>1</sup>

Name : \_\_\_\_\_  
Name of broker : \_\_\_\_\_  
Phone number : \_\_\_\_\_

Date of Acquisition <small>(day/month/year)</small>	Date of disposition <small>(day/month/year)</small>	Number of shares or units	Description	Sale price A	Purchase price B	Commissions C	Capital Gain (Loss) A-B-C

<sup>1</sup> Including the sale of principal residence or disposition of virtual currency

## APPENDIX 2

### RENTAL INCOME DURING 2022

Details of rental property	PROPERTY 1	PROPERTY 2
Address	_____	_____
Number of rental units	_____	_____
Rent beginning period (day/month/year)	_____	_____
Rent ending period (day/month/year)	_____	_____
Expenses related to personal use	_____ %	_____ %

#### STATEMENT OF INCOME AND EXPENSES

<b>INCOME</b>		
Gross Rental income	_____	_____
Other related income	_____	_____
<b>Total Income</b>	<b>A</b>	_____
<b>EXPENSES</b>		
Advertising	_____	_____
Insurance	_____	_____
Mortgage interest	_____	_____
Professional fees	_____	_____
Management and administration fees	_____	_____
Maintenance and repairs*	_____	_____
Property and school taxes	_____	_____
Utilities (light and power)	_____	_____
Other : _____	_____	_____
<b>Total expenses</b>	_____	_____
Less: Expenses related to personal use	_____	_____
<b>Eligible expenses</b>	<b>B</b>	_____
<b>Net Income</b>	<b>A-B</b>	_____
Your ownership share (%)	_____ %	_____ %
<b>Your net Income</b>	_____	_____

*\* If you claim contractual employment expenses, please fill out Form TP1086.R.23.12 (Quebec resident only) or attach details of these expenses (name of contractual, S.I.N. or QST number, amount paid for services).*

Purchase cost (if purchased in 2022)	_____	_____
Additions in 2022 (capital expenses)	_____	_____
Specify	_____	_____
UCC as of December 31, 2021	_____	_____
Proceeds of disposition	_____	_____
Date of disposition	_____	_____
Was property acquired from a related person in 2022?	_____	_____