MARTIN PLANTE SERVICE COMPTABLE
Income tax

DOCUMENT TO PROVIDE:

- General Return of the previous year (Federal and provincial)
- Notice of assessment (Federal and Provincial)
- Tax information slip, forms or schedules we may need to complete your income tax.(all document that you must attach to your income are shown in brackets for reference only)
- Summary of medical expenses (provided by the pharmacy and/or private insurance)

Date :_______________________

CLIENT INFORMATION

Last name: ______________________________
First name: ______________________________
Date of birth (year, month, day) ______________________________
Social insurance number: ______________________________
Phone number: ______________________________
Email address: ______________________________

Complete address : ______________________________
____
____

Marital status :

Maried	☐	Common-law	☐
Widowed	☐	Divorced	☐
Separated	☐	Single	☐

Please indicate the date if there was, in the tax year,
a change in marital status : ______________________________

Do you live alone or only with dependent children
(single parent family) throughout the year? Yes ☐ No ☐

SPOUSE INFORMATION

Last name: ______________________________
Fist name: ______________________________
Date of birth (year, month, day): ______________________________
Social insurance number: ______________________________

Do we prepare the tax return for your spouse? Yes ☐ No ☐

(Please complete the following section only if we do not prepare tax returns)

Federal income:_____________________ Provincial income: ___________________

DEPENDENT CHILDREN

[Provide RL-24 RL-30 slip (childcare expenses), RL-8 and T2202A (Tuition/education receipts)]
**Please check « Yes » if the child is in full-time post-secondary education*

Last name and first name	Date of birth (yy, mm, dd)	Net income	S.I.N	Education*
______	______	______	______	Yes ☐
______	______	______	______	Yes ☐
______	______	______	______	Yes ☐

Is a dependent child has an impairment in physical or mental function? Yes ☐

Do you have a joint custody arrangement? Yes ☐
Specify: ______________________________

FINANCIAL EXPENSES

Carrying charges and interest [supporting evidence] : ______________ $
Fees paid to an investment advisor: ______________ $
Cost of holding securities: ______________ $

OTHER CREDIT

Public transit
Have you incurred expenses for the use of transit services
(you, your spouse or child under 19 years) [Transit pass receipts]? Yes ☐

Children's arts and sports programs
Have you incurred expenses to register your child
to an artistic or sports activity? Yes ☐

SPECIFIC QUESTIONS

Instalment payment

Federal [Last statement] ______________________ $

Provincial [Last statement] ______________________ $

Foreign property

Did you own or hold (spouse and/or child), at any time in 2014, foreign property with a total cost of more than $ 100,000 CA? Yes ☐ No ☐

Drug insurance plan

Were you covered by a private group insurance plan which you or your spouse has joined? Yes ☐ No ☐

If you were covered for a period of less than 12 months, by a group insurance plan, indicate the number of months : ____________________

Do you have a complementary insurance plan? Yes ☐ No ☐

RRSP

Provide RRSP deduction limit statement on your latest notice of assessment or T1028 provides by the government after processing your 2016 return.
Provide all RRSP contribution slip

Capital gains and losses

Provide all necessary documents. [T3, T4PS, T5, T5013 or Schedule 3]

Engagement letter

It is mandatory to sign the letter of commitment to the recovery of your documents

Certificates of taxpayer in respect of actual or deemed disposition Of real estate in 2018

Under new tax rules announced on October 3, 2016, there may now be some negative tax impacts resulting from a failure to report a disposition of real property, including a **federal penalty of up to $ 8,000** in respect of the actual or deemed disposition of a property qualifying for exemption from the principal residence capital gain. In addition, another unfavorable rule was announced when a taxpayer disposes of real property without declaring it in his tax returns, even if it is sold at a loss.

Therefore, I certify to the preparers of my 2018 tax returns that:

NB Check the appropriate box for <u>each</u> of the 4 attestations below. A "real property" includes a house, land, dwelling, condo, cottage, mobile home, etc.

		YES	NO
1-	Have you sold, transferred or given property in 2018 to anyone? If yes, please from which year have you sold and the amount received:	☐	☐
2-	Have you begun to rent anyone to property in 2018 that you previously used for personal use?	☐	☐
3-	Have you begun to use for personal use in 2018 real estate that you rent to anyone before that time?	☐	☐
4-	Have you consented to any right of passage or easement on land in 2018?	☐	☐

______________________ ________________________ ________________
Signature of Taxpayer Name of Taxpayer Date