

2024 PERSONAL TAX INFORMATION

EXISTING CLIENTS

Choose one option below to receive your tax return and forms

I would like to receive my tax package and forms:

Electronically Paper (pick up)

Name

Preferred Contact Method

Email Phone

Email (required)

Phone

Address

City

Postal Code

Province

Filing for Spouse too? Spouse's Name

Yes No

Spouse's Preferred Contact Method

Email Phone

Spouse's Email (required if we are filing for them too)

Spouse's Phone

Are we filing a tax return any Children/Dependant? Yes No If Yes, please provide names below

Additional Questions	Yes	No	Details (Text adjusts to fit space)
1. Did you or your spouse hold foreign income producing real estate, securities traded on a foreign stock exchange, foreign bank accounts, and/or foreign loans that had a cost greater than \$100,000 at any time during 2024?			
2. Did you sell your home in 2024 or 2025?			
3. Did you operate a short-term rental (AirBnB, VRBO) in 2024?			
3a. If Yes to Q3, was the rental property compliant with all Provincial and Municipal licensing, permitting, and registration requirements by Dec 31, 2024?			
3b. If Yes to Q3, was there a change from short-term to long-term rental (or vice versa) in 2024 or 2025? Short-term rental eligibility			
4. Any change to Canadian Citizenship in 2024? If yes, provide details.			
5. Any change in marital status in 2024? If yes, provide details and date of change.			
6. Did you have any new dependents in 2024? If yes, provide details.			
7. Did you create a secondary unit in your home for a senior or disabled family member? MHRTC			
8. Did you open an FHSA (First Home Savings Account) in 2024? FHSA			
9. Has your banking information changed in 2024? If yes, we will contact you for updated information.			
10. Have you provided us with all information that is needed to complete this tax return? If not, what is missing?			

For a detailed review of income, tax deductions, and tax credits, see our [2024 Detailed Personal Tax Checklist](#)