

Confidential: this form contains your social insurance number.

Do not send it by regular email. Upload it with your documents at bourcpa.ca/upload, or bring it to the office.

Fill it in on screen (Acrobat Reader, Preview, browser) and save it, or print it.

1 Your information

First name		Last name	
Social insurance number (SIN)	Date of birth (YYYY-MM-DD)	Phone	
Address (number, street, apartment)			
City	Province	Postal code	
	Quebec		
Email (the one you will use for the online drop-off)		Arrival in Canada, if recent (YYYY-MM-DD)	
Correspondence language: ☐ French ☐ English			

2 Marital status on December 31

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

If your status changed during the year: date of change (YYYY-MM-DD)

Your spouse or common-law partner

First name	Last name	SIN	Date of birth

☐ We are also preparing my spouse's return.

If not, your spouse's approximate net income (\$)

3 Children and other dependants

First and last name	Date of birth	SIN (if known)	Relationship (son, parent...)	Shared custody
				☐
				☐
				☐
				☐

4 Your sources of income

Check everything that applies for the year.

- | | | |
|---|--|--|
| ☐ Employment (T4, RL-1) | ☐ Self-employment or commissions | ☐ Rental income |
| ☐ Interest, dividends, investments | ☐ Sale of investments or property | ☐ Pension, annuity, QPP, OAS |
| ☐ RRSP or RRIF withdrawals | ☐ Employment insurance or QPIP | ☐ Social assistance, CNESST or SAAQ |
| ☐ Scholarships | ☐ Support payments received | ☐ Foreign income |
| ☐ Tips | | |

Other income

5 Your year

Check what applies: we will tell you which documents to provide.

- | | | |
|--|--|--|
| ☐ Tenant (RL-31) | ☐ Homeowner | ☐ First home purchase |
| ☐ Sale of your home | ☐ Move for a job or studies | ☐ Childcare expenses |
| ☐ Tuition (you or a child) | ☐ Significant medical expenses | ☐ Charitable donations |
| ☐ RRSP or FHSA contributions | ☐ Work from home required by employer | ☐ Disability (you or a relative) |
| ☐ Caring for a relative (caregiver) | ☐ Tax instalments paid | ☐ Foreign property over \$100,000 |

6 Your previous returns

Did you file your returns last year? ☐ Yes ☐ No

Years not filed, if any

Previous accountant or software used

Have you received a notice or letter from the CRA or Revenu Québec that is still unanswered? ☐ Yes ☐ No

7 Questions or details

Anything we should know about your situation (other dependants, changes, questions)

8 Consent and signature

I confirm that this information is accurate and complete. I authorize ASW Services comptables to use it to prepare my income tax returns, in accordance with its privacy policy (bourcpa.ca/en/privacy). I will notify the firm of any change.

Signature (or full name, if filling in on screen)

Date (YYYY-MM-DD)

Spouse's signature (if we are also preparing their return)

Date (YYYY-MM-DD)

To access your file with the CRA and Revenu Québec, we will ask you for separate authorizations.