Information we are waiting for:	Questions:

## **Client Information - 2024 TAX YEAR**

Date & Time in:	How late can MTS call?		
1013 signed_yes / No	T183 signed	J_Yes / No	
Name			
Is your address the same as	s last year? Yes / No		
Address If different or new	client:		
Best e-mail to contact you			
Male D.O.B			
Ph.(hm)	(wk./cell His)	(wk./cell He	ers)
Marital Status as of 31 Dec	. 2024 if mari	tal status changed, date of	change
If changed to CL date you n	noved in together?		
On. Rent (Rec.Req.)a	ddress if dif. from abov	ve, & landlord	
Prop. Tax (actual amount. r	eq)		
Approx. Inc. of Spouse (if r	ot filing here) \$	Name:	SIN:
Dependents living with you	:		
	DOB	M \ F Income	
	DOB	M \ F Income	
	DOB	M \ F Income	
Were any healthy homes re	enos. done for seniors.	(over 65)	Yes / No
Do you or anyone in your fa <b>be dependent on you for f</b>			nent? Family member must g, diabetes, mental
functions, speaking, hearing	ig, vision etc.:		Yes / No
Any childcare expenses, inc	:l. day camp:(name & a	ddress of sitter req.)	Yes / No
Any RSP contributions? (RS	P's in 1st 60 days must	be claimed on this tax retu	ırn?) Yes / No
Did you move at least 40kn	ns closer to a new place	of employment?	Yes / No
Did you pay or receive spou If yes, we need the break d	usal support: own for - Spousal \$	Child \$	Yes / No

Any capital gains to report:(i.e., did you sell a 2 <sup>nd</sup> property or stocks?)	
Did you sell your primary res. in 2024? If yes; year purchased, price sold for	Yes / No
Is anyone a volunteer as either a firefighter or search & rescue person?	Yes / No
Are you a first-time home buyer?	
Any tuition paid for yourself or transferred from a dependent:	Yes / No Yes / No
Any med. Exp. ( <b>including premiums</b> ) totaling over 3% of income:(R.R) If yes reimbursed for any of it?	Yes / No Yes / No
Do you have charitable donations?	Yes / No
Any public transit passes-must be 65 as of 1 Jan. 2024	Yes/ No
Did you subscribe to a Digital News Subscription in 2024:	Yes / No
Did you pay any interest on any student or investment loans:	Yes / No
Union or Professional dues:(R.R.)	Yes / No
Self Employed? (if new or any changes from last year, go through bus. sheet)   If self-employed: are you HST reg   any income from web page   Did you opt into paying El	Yes / No Yes / No Yes / No Yes / No
Rental Income:(if new or any changes from last year, go through rental sheet)	Yes / No
Employment Exp.: (teaching supplies for teachers now qualify)	
If Yes for employment expenses, T2200 signed:	
OK to give name, address & DOB to Elections Canada:	
Foreign investments worth over CAD \$100,000	
Are you Canadian Citizens	
Any other income to report that's not included	Yes / No