

# Personal Information Questionnaire (2023)

Please fill a copy per individual (except for minors)

First Name	Last Name	Date of Birth (dd-mm-yyyy)	Male	Female
Social Insurance Number (SIN)	Province of Residence on December 31 <sup>st</sup> 2023	Status in Canada		
E-mail	Language	Would you like to receive the Notice of Assessment electronically?	Yes	No
Current Address	Apt. #	City	Postal Code	Phone
Is this the first time you file in:	Quebec	Canada	If you moved to Canada in 2022 or 2023, enter the date of arrival	
Did you own foreign property in 2023 with a total cost over CAN\$100,000?	Yes	No	If you moved out of Canada in 2023, enter the date you left	
Marital Status on December 31 <sup>st</sup>	Did your marital status change in 2023?	Yes	No	If yes, enter the date of change

Please provide the information of your family members who lived with you and were supported by you in 2023, if applicable:

First & Last Name	Date of Birth	SIN	Relationship	First & Last Name	Date of Birth	SIN	Relationship
1-				3-			
2-				4-			

## Check all that applied to your situation in 2023:

Employment Income	Tuition/ Education	RRSP Contributions (March to December 2023)
Self- Employment Income	Scholarship/ Bursary	RRSP Contributions (First 60 days of 2024)
Uber/ Doordash (or similar) Income	Union or Professional Dues	FHSA Contributions
Rental Income (including Airbnb)	Eligible Medical Expenses	Bought First principal residence
Employment Insurance Income (job loss, parental benefits...)	Eligible Donation	Sold a property
Investment Income (other than TFSA & RRSP)	Childcare Expenses (daycare, physical or artistic activities)	Planning to buy a condo/house in 2024 or 2025
RRSP Withdrawal	Moving (to get at least 40 km closer to work/school)	

If Canada & Quebec Revenue do not already have your updated bank information, please provide us with a copy of a void cheque

## The following section to be filled by Quebec Residents Only:

Did you have a group medical insurance in 2023 with your employer OR your spouse's employer? Yes No If yes

If you were covered by a group medical insurance only part of the year, check the month(s) when you have been covered for at least one day:

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

## Solidarity Tax Credit (please ignore this section, if your family income is more than \$75,000)

On December 31<sup>st</sup> 2023, did you reside at the same address that you mentioned above? Yes No

If no, what was your address on December 31<sup>st</sup> 2023?

Throughout 2023, did you:

On December 31<sup>st</sup> 2023, were you? \*If you were a tenant, your landlord should give you a Relevé 31. We need a copy of it.

If Owner, provide the number of owners & the roll number or identification number that appears on the municipal tax bill

## If it's the first time you use our services, please let us know how did you hear about us:

Online Friend Referral Friend's name

## Tax Declaration Fees

Student: \$40 + tax  
Full-time Student with employment: \$50 \* + tax  
Employed / Other: \$80 \* + tax (\$20 discount for couples)  
Self-Employed: \$100 to \$160 + tax (on a case by case basis) \*  
\* Additional charges may apply for special cases. For more details, go to [taxdeclaration.ca/fees](http://taxdeclaration.ca/fees)



Together, we can help!  
This year, for each tax declaration we file,  
\$1.00 will be donated to  
Humanitarian Coalition



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