

Date submitted : - - (AAAA-MM-JJ)

Requestor
☐ Mr. ☐ Mrs.

Last name:

First name:

Partner
☐ Mr. ☐ Mrs.

Last name:

First name:

Tax Return of the Requestor and the Partner

Tax reports to produce (years): eg: «2017» or «2015 to 2017»

Province of residence on December 31:

 Do you require express service ? ☐ Yes ☐ No

 Do you require an appointment with an accountant ? ☐ Yes ☐ No

 Did you file your previous return with us? ☐ Yes ☐ No

 If «Yes», has your personal information changed? ☐ Yes ☐ No

If «No», please leave the «Personal Information» sections blank.

 Impôts Ici ! will treat my partner's return: ☐ Yes ☐ No

If «No» : • Line 236 federal:

• Line 275 provincial:

• Providing us with your partner's full return is mandatory.

• Optimisation fees may apply.

Personal Information of the Requestor

 Are you a Canadian citizen? ☐ Yes ☐ No

Date of birth: - - (AAAA-MM-JJ)

Social insurance number:

Phone (day):

Phone (night):

Email:

Address: Apt.:

City: Province:

Postal code:

If new address, specify date of move: - -

Personal Information of the Partner

 Is your partner a Canadian citizen? ☐ Yes ☐ No

Date of birth: - - (AAAA-MM-JJ)

Social insurance number:

Phone (day):

Phone (night):

Email:

☐ Residing at the same address

Address: Apt.:

City: Province:

Code postal:

If new address, specify date of move: - -

Drug Insurance of the Requestor

(Indicate months that apply) J F M A M J J A S O N D

Governmental (RAMQ): ○○○○○○○○○○○○○○

My own group insurance: ○○○○○○○○○○○○○○

Group insurance (parent/partner): ○○○○○○○○○○○○○○

Other exceptions: Working holiday program, immigrant, etc.: ○○○○○○○○○○○○○○

Drug Insurance of the Partner

(Indicate months that apply) J F M A M J J A S O N D

Governmental (RAMQ): ○○○○○○○○○○○○○○

My own group insurance: ○○○○○○○○○○○○○○

Group insurance (parent/partner): ○○○○○○○○○○○○○○

Other exceptions: Working holiday program, immigrant, etc.: ○○○○○○○○○○○○○○

Emergency Contact

Name of the contact:

Relationship: Phone:

Civil Status

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

If your civil status has changed this year: Preceding status: Date of change: - - (AAAA-MM-JJ)

Dependents

(Childs, parents, grands-parents, etc. residing at same address. Please describe in the details any exceptional situation: e.g. dependent on even years.)

First name	Last name	Relationship	Date of birth (AAAA-MM-JJ)	Net income	Person with a disability	Post-secondary student	I pay child support
.....			 - -		☐	☐	☐
.....			 - -		☐	☐	☐
.....			 - -		☐	☐	☐

Details:

Additional information

(Please answer yes if the following questions applies to you and/or your spouse.)

☐ Yes ☐ No I lived alone during the whole year (Excluding dependent persons)

☐ Yes ☐ No I arrived in Canada or emigrated out of it this year

☐ Yes ☐ No I own more than 100 000\$ of foreign assets (including investments holded here)

☐ Yes ☐ No I wish to claim work expenses related to COVID using the method without calculation
(maximum deduction of 500\$ for the federal level and of 400\$ for Quebec) [Only for 2020, 2021 & 2022]

If so, the number of days I have worked at home because of COVID is:

Me My spouse

☐ Yes ☐ No I bought a first principal residence this year

If so, my date of purchase is: - - (AAAA-MM-JJ)

☐ Yes ☐ No I sold a principal residence during the year

☐ Yes ☐ No I was born in the United States, am an American citizen or holder of a green card (refer to Effisca)

☐ Yes ☐ No I would like to update my retirement planning (free service provided by an external partner)

☐ Yes ☐ No I would like to receive promotional offers from partners regarding my mortgage

If so, my mortgage renewal date is: - - (AAAA-MM-JJ)

☐ Yes ☐ No Do you want credit splitting or income splitting, if necessary, to optimize the couple's tax liability? If you want a partial optimization, please specify the credits for which you want an optimization:

☐ Yes ☐ No For double-checking purpose, we want to be able to download your current tax informations directly from CRA and Revenu Quebec Website. Do we have your approval?

Name of requestor

Name of partner

Instructions

Please sort your documents in the order of the documents in this list.
Please keep your originals and bring us only copies.

Save 10\$ by submitting online!

Visit our website for the Virtual Drop : impots-ici.com

Documents to bring

Mandatory

- Last federal **and** provincial notice of assessment*
- Last federal **and** provincial income tax return (only for new clients)*
- Cheque specimen if never requested direct deposit - **Mandatory** for Solidarity Tax Credit*
- LLB, HBP information if applicable (balance and amount to be repaid in the year, etc.)
- Solidarity tax credit: Slip 31 (if tenant) or City taxes ID number (if owner)*

Income

- Employment income: T4 (federal) / Relevé 1 (Quebec)*
- Investment income: T3, T5, T4A, T5008
or Summary of gains / losses, etc.*
- Scholarship: T4A*
- Public retirement: Old age security: T4A (OAS) + QPP: T4A (P) *
- Employment Insurance (unemployment): T4E slip*
- Parental insurance benefits (parental leave): T4E slip*
- COVID benefits: CERB or CESB or CRB or CRSB
or CRCB - T4A from CRA or T4E from Service Canada*
- CSST, SAAQ, Welfare: T5007/Slip 5*
- Self-employed (income & expenses) [Fill the form](#)
- Rental income (income & expenses) [Fill the form](#)
- Rental income (Building history) [Fill the form](#)
- T1135 if you own more than 100 000\$ of assets outside Canada
- Arrivals or departures from Canada [Fill the form](#)
- Principal residence disposition [Fill the form](#)
- Building Disposition (other than principal residence) [Fill the form](#)

Kids

- Childcare expenses
 - RL-24 Not Subsidized
 - RL-30 Subsidized (only before 2019) *
- Childcare tax credit advance payments: Slip 19*
- Children's Fitness Tax Credit, Children's art tax credit*

Deductions

- Work expenses (regular): TP-64.3+T2200 + [Fill the form](#)
- Work expenses (COVID-19 without calculation): Nothing to provide
- Work expenses (COVID-19 with calculation):
T2200S + TP-64.3S + [Fill the form](#)
- RRSP: Official receipts (1st March to 31 December) *
- RRSP: Official receipts (60 first days of the year)*
- CELIAPP: Official receipts
- Tuition fees: Slip 8/T2202 or T2202A*
- Interest paid on student loans: Bank or Caisse account receipt*
- Medical expenses [Fill the form](#)
- Moving expenses [Fill the form](#)
- Charity donation / Political contributions*
- Union dues or professionals dues (if other than on T4)*
- Instalments / provisional payment: official government statement*
- Home support services for seniors (70 years old or more): If you are already receiving advance payments (RL-19), DO NOT COMPLETE the questionnaire [Fill the form](#)
- Purchase of a First-Time Home: [Fill the form](#)

Other

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Impôts Ici !
info@impots-ici.com

Provincial government
514 864-6299

Federal government
1 800 959-7383

* Item included in our base price. Extra fees applies if more than 15 documents. All other documents result in additional charges, including those not mentioned.

Fees estimation detail / Non-resident

Item	Estimated quantity	Non-taxable fee
NII request		110.00\$ + swearing-in fees
NRK request		77.00\$
NR4 request		126.50\$
NR5 request (minimum)		253.00\$
NR6 request		189.75\$
NR7-R request (minimum)		165.00\$
216 election (minimum)		343.75\$
216.1 election (minimum)		343.75\$
217 election (minimum)		316.50\$
218.3 election (minimum)		316.50\$
Business income (self-employed) (completed by us)		253.00\$
GST / QST return (minimum)		110.00\$ + taxes

Fees estimation detail / Estates & trusts

Item	Estimated quantity	Fee before taxes
Deceased Return or Final Return		187.50\$
Clearance certificate		140.00\$
Request for identification number (FED + QC) per level		80.00\$
Estate declaration - base rate		370.00\$ + additional fee annex
T3 slips - Relevés 16 (per beneficiary)		77.00\$

Fees estimation detail

Item	Estimated quantity	Fee before taxes
Tax returns - base rate		165.00\$
Rebate loyal client		-31.62\$
Student package		86.99\$
Arrival or departure in Canada		35.00\$
Work expenses schedule (regular)		170.44\$
Rental income schedule		170.44\$
Business income (self-employed)		170.44\$
Moving fees		102.24\$
Capital gains schedule (minimum)		93.50\$
T1135 (CRA) - Foreign Income Balance Sheet + 100,000 \$		88.00\$
TP-1079 (RQ) - Foreign Income Balance Sheet + 100,000 \$		88.00\$
Adjustment request (minimum + supplement on receipt of documents) — former client		165.00\$
Adjustment request (minimum + supplement on receipt of documents) — new client		287.10\$
GST / QST return (minimum)		110.00\$
Request for CRA-RQ Power of Attorney		30.52\$
Supplement – complete file deposited from March 20th until June 15th		27.50\$
Registered mail (by recipient / envelope)		35.00\$
Additional documents (10 documents included in the base price)		4.27\$ / additional document
Express		55.00\$
Foreign tax credit / Foreign exchange calculation		Billed per minute Technician: 2.55\$ Senior techn.: 3.00\$ Accountant: 4.12\$ Senior account.: 5.12\$ Tax master: 8.33\$
Optimization – spouse or child not processed by us		
Post-bankruptcy (minimum 268.75\$)		
T1161 (starting price 60.75\$)		
Principal residence disposition (minimum 30.25\$)		
Assistance with an individual's tax audit (150.00\$)		

Conditions and pricing

Payment can be made by Interac transfer or credit card.

I have read and accept the above prices. A deposit equivalent to the estimated amount is required. If items not identified in the **estimate** are discovered, the difference will be adjusted when the final invoice is issued.

Processing will begin as soon as all the necessary documents (complete file) have been received, and the deposit has been paid.

If you wish to pay an additional fee to review your declaration with the accountant, this can **only** be done after receipt of your processed declaration. Rates for review are \$94.75 for 30 minutes and \$189.50 for 1 hour. Please visit our website to book an appointment.

Expected delivery date

The tax returns will be available after this date.

Signature

X