This form is approved for 2023 and earlier tax years only. Please download the most recent version if you are filing a tax year after 2023.

If you have sold a principal residence, please fill this questionnaire.

1. Did you, your spouse, your ex-spouse or your child lived in the property for all years that you owned the property? A cabin qualifies.
* No: please schedule an appointment for a mandatory tax consult since you do not qualify. Do not answer the remaining questions.
* Yes: please answer next question.
1. During the ownership of this property, did you own, at any moment, another property? Please do not count a year if you sold and bought a property that same year.
* No: please answer all remaining questions.
* Yes: please schedule an appointment for a mandatory tax consult, we need to know more about your situation. Many tax planning possibilities need to be analyzed. Please do not answer the remaining questions.
1. Description of property (ex.: condo, house, etc.):

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1. Address of the property you sold :

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1. What date did you buy the property? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. How much did you pay the property? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. How much did you sold the property for?

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1. Date you sold the property?

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1. Your share of this sale? (ex. Me 50% & my spouse 50%) :

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1. If you think any other information would be useful, please use this space :

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