

EFFISCA

QUESTIONNAIRE: **CANADA**

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: .....

Canadian tax residency status: .....

Do you require express service ? Yes No

Effisca will treat my partner's return: 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.

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**

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**

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:

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## Additional information

(Please answer the following questions for 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 [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
- 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
- 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    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?

How did you learn about our firm, or who refered you to us ? .....

Name of requestor .....

Name of partner .....

**Instructions**

Please sort your documents in the order of the documents in this list.

**The new platform is simpler and faster**

A fee of \$100 per return applies to manual drop method, as we perform manual validation of documents and a manual estimate of fees. Try the Smart Drop if you can.

**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:
  - If not provided previously
  - **Mandatory** for Solidarity Tax Credit\*

**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  
[Fill the form](#)
- Arrivals or departures from Canada [Fill the form](#)
- Principal residence disposition [Fill the form](#)
- Building Disposition (other than principal residence) [Fill the form](#)

**Other**

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.....

\* Item included in our base price. Extra fees applies if more than 10 documents. All other documents result in additional charges, including those not mentioned.

**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 (if your family income does not exceed \$155,880 for 2023) \*

**Deductions**

- Work expenses — regular: TP-64.3+T2200 + [Fill the form](#)
- Work expenses — COVID-19 without calculation (2020, 2021 et 2022 only): Maximum claim 500\$, nothing to provide
- Work expenses — COVID-19 with calculation (2020, 2021 et 2022 seulement): T2200S + TP-64.3 + [Fill the form](#)
- **New!** FHSA: Official receipts
- RRSP: Official receipts (1st March to 31 December) \*
- RRSP: Official receipts (60 first days of the year)\*
- 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\*
- **New!** Advanced Canada Workers Benefit (Form RC210)
- 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):  
[Fill the form](#)
- Rénovert (2016 to 2019) : form TP-1029.RV.A completed by the contractor
- Solidarity tax credit: Slip 31 (if tenant) or municipal tax statement (if owner)\*

Item	Fee before taxes (\$CAD)
Tax returns – base rate (without appointment)	400.00\$
Tax returns – simple child (low income, no self-employment / rental income)	90.00\$
Manual drop and quote – per return	100.00\$
Rebate loyal client	-40.00\$
Arrival or departure in Canada	115.00\$
Work expenses schedule – regular	215.00\$
Work expenses schedule – COVID-19 with calculation (2020, 2021 and 2022)	115.00\$
Rental income schedule	215.00\$
Business income (self-employed) (50% if no expenses)	215.00\$
Express (per return)	Depending on date
Power of attorney (by level of government)	50.00\$
Deceased person (in addition to the base price)	300.00\$
Supplement – complete file deposited after March 14th	40.00\$
Supplement – complete file deposited after March 31st	65.00\$
Additional documents (10 documents included in the base price)	6.00\$ / excess document
Moving fees	130.00\$
Principal residence disposition	50.00\$
<b>New!</b> Tax return review with a tax master	10.00\$ / minute
T1135 * – Simple (fixed fee)	175.00\$
T1135 * – Intermediate (fixed fee)	275.00\$
T1135 * – Complex (billed per minute, minimum 500\$)	<b>Billed per minute</b> Technician: 3.00\$ Tax director.: 7.00\$ Tax master: 7.50\$
T1161 (minimum 150.00\$)	
GST/QST return (minimum 150\$)	
Foreign tax credit / Foreign exchange calculation	
Optimization – spouse or child not processed by us	
Property disposition (other than principal residence) - minimum 200\$	
Capital gains	
Other (please describe):	

\* Your file will be analyzed upon receipt and your quote will indicate the appropriate class.

## Conditions and pricing

Payment by email transfer only.

I acknowledge and accept the prices above.

I confirm that nothing is missing and that additional charges apply if I add documents later.

An estimate will be sent and a deposit will be required.

Appointments are by videoconference only.

**New!** The appointment will be proposed once the final return has been submitted for approval.

Treatment delays begin once all documents are received (complete file).

**Signature**

X