escient
expertise + engagement

2025

Required Form
Personal Income Tax Return

We have created this new required form to accelerate the preparation process for your tax returns, covering recurring questions that apply to all our clients.

Please take a few minutes to answer the following questions and share any specific details about your situation in the "Comments" section.

Please note that, for efficiency reasons, we will not begin processing your tax returns until we have received the duly completed form.

	YOU	SPOUSE	CHILD 1	CHILD 2	CHILD 3
Complete name:	_____	_____	_____	_____	_____
Relationship to you:					
PERSONAL INFORMATION					
To be completed only if there were changes in 2025 and for new clients.					
Address:	_____	_____	_____	_____	_____
City:	_____	_____	_____	_____	_____
Province:	_____	_____	_____	_____	_____
Postal code:	_____	_____	_____	_____	_____
Email address:	_____	_____	_____	_____	_____
Cell phone number:	_____	_____	_____	_____	_____
Date of birth (dd/mm/yyyy):	_____	_____	_____	_____	_____
Social insurance number:	_____	_____	_____	_____	_____
Marital status as of Dec. 31, 2024:					
Has your marital status changed in 2025?	○ Yes ○ No	○ Yes ○ No			
| New marital status as of December 31, 2025, if applicable					
| Date of change (dd/mm)	_____	_____			

Required Form (cont'd)
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NET INCOME OF YOUR SPOUSE					
To be completed only if there were changes in 2025 and for new clients.					
Federal — Line 23600:		$ _____			
Québec — Line 275:		$ _____			
Is your spouse self-employed?		◯ Yes ◯ No			
DIRECT DEPOSIT					
Are you registered for direct deposit?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Have your banking details changed in 2025?	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Did your child turn 18 in 2025? If applicable, your child must be registered for direct deposit in order to receive the solidarity tax credit. Please provide a void cheque from their bank account.			◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No

For any new registration or changes to banking information in 2025, please provide us with a void cheque.
Please note that we can no longer complete the registration or make changes at the federal level. You will be required to do so yourself through 'My Account'.

YOUR PERSONAL SITUATION					
At any time during the year, did you own foreign property with a total cost of more than $100,000 CAD? (If applicable, please provide "Foreign Property" schedule)	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No	◯ Yes ◯ No
Did you dispose of a principal residence, land or other property in 2025? (If applicable, please provide details)	◯ Yes ◯ No	◯ Yes ◯ No			
Did you change the use of a property in 2025? (If applicable, please provide details)	◯ Yes ◯ No	◯ Yes ◯ No			
Is the property changing from personal use to rental use?	◯ Yes ◯ No	◯ Yes ◯ No			
Is the property changing from rental use to personal use?	◯ Yes ◯ No	◯ Yes ◯ No			

Required Form (cont'd)
Personal Income Tax Return

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YOUR PERSONAL INFORMATION (CONT'D)					
Did you attend a post-secondary school in 2025? (If applicable, please provide us with the T2202 slip and the Relevé 8 for each institution. These documents usually need to be downloaded by the student from their school's website)	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Registered savings accounts *(please provide us with the receipts)*					
Did you contribute to your RRSP between March 1 and December 31, 2025?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Did you contribute to your RRSP between January 1 and March 3, 2026?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Did you open one or more FHSAs in 2025 and did not make any contributions, transfers or withdrawals?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Did you contribute to your FHSA in 2025?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
QUÉBEC RESIDENTS ONLY					
Contribution to the Québec prescription drug insurance plan (RAMQ)					
Were you covered by a private or group insurance plan for prescription drugs for the entire year? If you were covered by the RAMQ's plan, please answer "No".	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
If you were covered for only part of the year, please provide the period of coverage (mm/dd):	from _____ to _____	from _____ to _____	from _____ to _____	from _____ to _____	from _____ to _____

Required Form (cont'd)
Personal Income Tax Return

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QUÉBEC RESIDENTS ONLY (CONT'D)					
Cryptoassets					
Did you receive, hold, or dispose of (sell, transfer, exchange, etc.) one or more crypto-assets in 2025? (If applicable, please complete the "Cryptoassets" schedule)	❍ Yes ❍ No	❍ Yes ❍ No	❍ Yes ❍ No	❍ Yes ❍ No	❍ Yes ❍ No
Amount for a person living alone					
Did you live alone or only with minor or dependent children attending post-secondary school throughout the entire year 2025?	❍ Yes ❍ No				
Refund transferred to spouse					
Do you agree to transfer your tax refund to your spouse if they have a balance due?	❍ Yes ❍ No	❍ Yes ❍ No			

COMMENTS