

Please complete the applicable fields.

A TAX RETURNS TO FILE

Tax year(s) to file *			
Province of residence on December 31 *	Quebec		
Filing date			
Question	Yes	No	
Would you like Express Service?	☐	☐	
Would you like to book an appointment with a member of our team?	☐	☐	
Did GestionJC prepare your previous tax return?	☐	☐	

B APPLICANT INFORMATION

Last name *	
First name(s) *	
Date of birth *	
Social Insurance Number *	
Phone *	
Email *	
Full address (including apartment no., if applicable) *	
City *	
Postal code *	
Date of move, if new address	

C SPOUSE/PARTNER TAX RETURN

Question	Yes	No	
Will GestionJC prepare your spouse/partner's tax return?	☐	☐	
If no - federal net income, line 23600			
If no - Quebec net income, line 275			

Your spouse/partner's complete tax return may be required to properly assess credits and optimize your household tax situation.

2. YOUR FAMILY

Family status and coverage

D SPOUSE/PARTNER INFORMATION

Spouse/partner's last name	
Spouse/partner's first name(s)	
Date of birth	
Social Insurance Number	
Phone	
Email	
Lives at the same address	☐ Yes ☐ No
Full address, if different	

E MARITAL STATUS

Question	Yes	No
Single	☐	☐
Common-law	☐	☐
Married	☐	☐
Separated	☐	☐
Divorced	☐	☐
Widowed	☐	☐
Previous marital status, if changed during the year		
Date of change		

F DEPENDANTS

First and last name	Relationship	Date of birth	Net income	Postsecondary student	Disability / pension

G DRUG INSURANCE Indicate the applicable months

APPLICANT

Coverage	J	F	M	A	M	J	J	A	S	O	N	D
RAMQ	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Personal group plan	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Parent/spouse group plan	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other exemption	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Details - other exemption: ____

SPOUSE/PARTNER

Coverage	J	F	M	A	M	J	J	A	S	O	N	D
RAMQ	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Personal group plan	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Parent/spouse group plan	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other exemption	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Details - other exemption: ____

3. YOUR TAX SITUATION

Tax validation questions

H EMERGENCY CONTACT

Contact person's name	
Relationship	
Phone	

I SPECIAL SITUATIONS Answer based on your situation or your spouse/partner's

Question	Yes	No
Did you live alone all year, excluding dependants?	☐	☐
Did you enter Canada or permanently leave Canada during the year?	☐	☐
Do you own foreign property with a total cost amount exceeding CAD 100,000?	☐	☐
Did you sell a principal residence during the year?	☐	☐
Did you purchase your first principal residence during the year?	☐	☐
Did you hold, acquire, sell, exchange, gift or use cryptoassets?	☐	☐
Did you pay or receive support payments (former spouse/partner)?	☐	☐
Did you incur moving expenses for a move of more than 40 km for school or work?	☐	☐
Did you receive self-employment or rental income?	☐	☐
Did you sell real property other than a principal residence?	☐	☐
Date of purchase of first home, if applicable		

J AUTHORIZATIONS AND OPTIMIZATION

Question	Yes	No
Do you authorize GestionJC to obtain your tax information from the CRA and Revenu Québec?	☐	☐
Would you like optimization of credits and income splitting between spouses/partners, where permitted?	☐	☐
Would you like to receive an updated retirement projection from an external partner?	☐	☐
Would you like to receive mortgage offers from GestionJC partners?	☐	☐
Partial optimization - credits to prioritize		
Comments or additional information		

Some answers may trigger a supplementary questionnaire or additional fees. GestionJC will confirm the scope before finalizing the file.

K ESSENTIAL DOCUMENTS

ESSENTIAL

- ☐ Federal and provincial Notice of Assessment from the previous year
- ☐ Most recent federal and Quebec tax returns - new clients
- ☐ HBP or LLP information, if applicable

INCOME

- ☐ T4 and RL-1
- ☐ T3, T5, T4A, T5008 or gain/loss statements
- ☐ T4A(OAS), T4A(P), T4E, RL-5 or T5007
- ☐ RL-19 and RC-210
- ☐ Questionnaire - Self-Employment, if applicable
- ☐ Questionnaire - Rental Income, if applicable
- ☐ Questionnaire - Rental Property History, if applicable

DEDUCTIONS AND CREDITS

- ☐ RRSP and FHSA receipts
- ☐ RL-8 / T2202
- ☐ Questionnaire - Medical Expenses, if applicable
- ☐ Donation receipts
- ☐ Union or professional dues
- ☐ Student loan interest
- ☐ Child care expenses and RL-24
- ☐ Children's physical or artistic activities
- ☐ RL-31 or municipal roll number

SPECIAL SITUATIONS

- ☐ T1135 - foreign property
- ☐ Questionnaire - Arrival in or Departure from Canada, if applicable
- ☐ Questionnaire - Sale of Principal Residence, if applicable
- ☐ Questionnaire - Sale of Real Property Other than a Principal Residence, if applicable
- ☐ Questionnaire - Employment Expenses, if applicable
- ☐ Questionnaire - Moving Expenses, if applicable
- ☐ Questionnaire - Cryptocurrency and Digital Assets, if applicable

L SUBMISSION INSTRUCTIONS

Organize the documents according to the categories above. Keep the originals. Upload only copies or legible files to the secure portal. Additional or specialized documents may result in additional fees.

M CLIENT CERTIFICATION

Applicant's name *

Spouse/partner's name, if applicable

I confirm that the information is complete and accurate

☐ Yes

Date

Signature

N PROPOSED PACKAGES Rates include taxes

ESSENTIAL \$229 / person

Up to 10 slips
CRA and RQ filing
Tax concierge: 30 min
Quantity: .

SELF-EMPLOYED \$499 / person

Essential + 1 self-employment schedule
Expense optimization
Tax concierge: 1 hr
Quantity: .

REAL ESTATE INVESTOR \$499 / person

Essential + 1 rental property
Capital gains and change in use
Tax concierge: 1 hr
Quantity: .

INTERNATIONAL INVESTOR \$599 / person

Essential + T1135
Foreign income
Tax concierge: 1 hr
Quantity: .

PRESTIGE \$799 / person

Combination of two complex profiles
Two rental properties
Enhanced support
Quantity: .

NON-RESIDENT \$699 / person

Canadian investments, rental income or pension
NR4 / section 217 / UHT, depending on the engagement
Quantity: .

O ADDITIONAL FEES AND DISCOUNTS

Item	Rate	Quantity
Moving expenses	94,99 \$	
Employment expenses	179,99 \$	
Arrival in or departure from Canada	36,99 \$	
Deceased person	212,99 \$	
Sale of principal residence	29,99 \$	
Cryptocurrency	Hourly rate	
Express Service - individual	100,00 \$	
Express Service - couple	150,00 \$	
Loyalty discount	100,00 \$	
Couple discount	100,00 \$	

P TERMS AND PAYMENT

TERMS

- Processing begins once the file and payment are complete.
- Any item not identified in the estimate will be added to the final invoice.
- Cancellation and refund terms will be confirmed upon deposit.

PAYMENT METHODS

- Interac e-Transfer
- Credit card through the online deposit

Initials: __ Signature: __

This commercial page is designed as an independent module. Rates and terms must be validated before the final version intended for clients.