

# Personal Tax Client Intake Form

Client Name:	SIN:	D.O.B.: <i>yyyy/mm/dd</i>		
Address:	City:	Province:		
E-mail:	Tel:	Postal Code:		
Did you and/or your spouse sold a principle residence home in the tax year? (If yes, provide additional documents pertaining to purchase and sale of the property)	Yes	No		
Did you and/or your spouse owned any foreign income generating assets at any time in the tax year or any other foreign assets with a combined cost of more than \$100,000? (If yes, provide details)	Yes	No		
Are you (Client) Canadian Citizen ?	Yes	No		
May CRA provide your name, address and SIN to Elections Canada?	Yes	No		
<b>MARITAL STATUS:</b>	<b>Date marital status changed:</b> <i>yyyy/mm/dd</i>			
Spouse Name:	SIN:	D.O.B.: <i>yyyy/mm/dd</i>		
Is your spouse Canadian Citizen ?	Yes	No		
May CRA provide your spouses name, address and SIN to Elections Canada?	Yes	No		
<b>DEPENDENTS</b> (If more space is needed, please use a blank sheet of paper)				
Name:	SIN:	D.O.B.: <i>yyyy/mm/dd</i>		
Name:	SIN:	D.O.B.: <i>yyyy/mm/dd</i>		
Name:	SIN:	D.O.B.: <i>yyyy/mm/dd</i>		
<b>OTHER INFORMATION</b>				
Provided a copy of last year's income tax return and schedules? (new clients only)	Yes	No		
Provided a copy of last year's notice of assessment?	Yes	No		
Elected split-pension income? (Subject to additional fees)	Yes	No		
File self-employed HST return? (Subject to additional fees)	Yes	No		
First time home buyer?	Yes	No		
RRSP home buyer's plan?	Yes	No		
Any family member(s) disabled?	Yes	No		
RRSP lifelong learning plan?	Yes	No		

**Engagement and Representation Letter - Personal Income Tax Return Preparation**

PROFIT Accounting & Associates "The Tax Preparers" will prepare your personal income tax return(s) (including family members where requested) for any requested tax year(s) and electronically file your return(s) where applicable. In order to prepare your income tax return(s) accurately and eliminate or reduce human errors, The Tax Preparers rely on and use a Canada Revenue Agency (CRA) approved tax preparation software with tax benefit optimization features. Your tax return(s) will be prepared based on the information provided by you and in accordance with the existing CRA's guidelines. The Tax Preparers will not audit, examine, review or otherwise verify the data you submit to us. The Tax Preparers may however, ask for clarification of some of the information provided. The Tax Preparers will not provide any tax advice. You will provide the Tax Preparers with correct information required to prepare complete and accurate returns and disclose accurate tax circumstances such as but not limited to: you marital status, tax filing status, foreign properties and assets you may own etc. You should retain all the documents, canceled cheques and other data that form the basis of your income and deductions. These may be necessary to prove the accuracy and completeness of the return to the CRA. The responsibility for the accuracy of the information and completeness of the representations reflected in your income tax return(s) remains with you. You should review your income tax return(s) carefully and verify the basic data such as the spelling of your name, your current legal address, your marital status, your date of birth and your social insurance number before you have it signed.

**FOREIGN PROPERTY DECLARATION (You must answer the following questions)**

***Did you and/or your spouse (where applicable) own/hold foreign property, investments and other assets at any time in the tax year with a combined cost of more than \$100,000? OR income from any foreign assets mentioned above regardless of their aggregate value and all income and transactions relating to non-resident trusts.***

YES ..... NO .....

*(If yes, provide details such as type, cost, highest value in the tax year, market value at the end of tax year and country)*

The Tax Preparers, respect the privacy of personal information, that is, information that identified you as an individual or that is associated with such identifying information. You agree to provide personal information necessary for us to meet your service requests. You also agree that you have obtained consent from others for whom you have provided us with personal information for collecting, using and disclosing this information, according to privacy legislation. The Tax Preparers follow rigorous privacy practices and have a privacy policy that governs the use and handling of the information you provided. For more information, please contact us at info@profitcma.com. If so indicated, you authorize CRA to forward your name(s), address(es) and date(s) of birth to Elections Canada to update information on the NATIONAL REGISTER OF ELECTORS.

***The Tax Preparation fee is based on the current fee Schedule Plus out-of-pocket expenses and HST. The Tax Preparation Fee covers only and only the task of preparing your Income tax return(s) and is subject to receiving complete, categorized, totaled and organized information from you. The Tax Preparers reserve the right to charge for any additional work such as categorizing, totalling and organizing your records, bookkeeping, follow ups regarding missing information etc. Post preparation work such as, walk through your income tax return(s), line by line explanations and other services are billed separately for our time. All invoices are due and payable upon presentation and prior to filing.***

***From time to time CANADA REVENUE AGENCY may require supporting documents and/or detailed information regarding any filed tax returns. To avoid a re-assessment, these requests must be responded to in a timely manner by you. In the event you instruct The Tax Preparers to respond to these inquiries on your behalf, additional fees will be applicable.***

***I/We the undersigned(s), here by accept the above terms and conditions and authorize PROFIT Accounting & Associates to prepare my/our personal income tax return(s).***

Print Name:

Signature: \_\_\_\_\_

Date: \_\_\_\_\_