

Tax Year (s): _____

Taxpayer 1 Name: _____ **SIN:** ____ - ____ - ____

Date of Birth: Year ____ Month ____ Day ____ Canadian Citizen: Yes No

Email: _____ Cell: _____

Register/update email with CRA to receive notifications? Yes No

Taxpayer 2/Partner Name: _____ **SIN:** ____ - ____ - ____

Date of Birth: Year ____ Month ____ Day ____ Canadian Citizen: Yes No

Email: _____ Cell: _____

Register/update email with CRA to receive notifications? Yes No

Marital Status on Dec. 31

- Single Married Common Law
 Widowed Divorced Separated

If your marital status changed what was reported last year?

If status change during the tax year enter date YYYY/MMM/DD: _____

Is your spouse a non- resident? Yes No

Did you **own or hold foreign property** at any time in the tax year with a total cost of more than CAN 100,000?

Yes No

As a Canadian citizen, do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors?

Yes No

Taxpayer(s) Current Address: This will be used by the Canada Revenue Agency for your mail.

Street: _____ City: _____ P.O. Box _____

Province: _____ Postal code _____

Did you become or cease to be a Canadian resident? Yes No If no skip next line

Date of entry DD/MMM/YYYY: _____ Date of departure DD/MMM/YYYY: _____

Province as at Dec 31st of tax year: British Columbia or Other: _____

How did you hear about Raspberry North Accounting?

- Prior Client Friends/Family Facebook Google Search Other _____

******Please complete Page 2******

Dependants (other than your spouse/partner) that resided with you during the tax year.

First & Last Name	Date of Birth DD/MMM/YYYY	Is there possibility of this dependant being claimed by another person? Yes/No	Relationship to taxpayer?	Infirm or disability?	Net income (if applicable)

Did you or your spouse/partner at any time during the tax year(s)...		Taxpayer 1		Taxpayer 2	
Income	Receive any other taxable income that is not already reported on your slips? For example: Tips/gratuities, foreign income etc.? Amount \$ _____	YES	NO	YES	NO
	Do you have any income or expenses from the following? <input type="checkbox"/> Self-employment <input type="checkbox"/> Rental <input type="checkbox"/> Farming	YES	NO	YES	NO
Tuition	Pay tuition for yourself or someone else?	YES	NO	YES	NO
	Wish to claim tuition transferred from someone other than spouse/partner?	YES	NO	YES	NO
	Make annual union, professional, or like dues?	YES	NO	YES	NO
	Pay for childcare?	YES	NO	YES	NO
	Take apprenticeship training through the Industry Training Authority? Add in notes	YES	NO	YES	NO
	Purchase your first home in Canada?	YES	NO	YES	NO
	Did you sell your principle residence?	YES	NO	YES	NO
	Did you or your children have eligible medical expenses?	YES	NO	YES	NO
	Make contributions to an RRSP between Mar -Dec or first 60 days of following year?	YES	NO	YES	NO
	Sell investment property, crypto or shares which may cause a capital gain or loss?	YES	NO	YES	NO
	Have job related expenses while employed? Include T2200E from employer.	YES	NO	YES	NO
	Do you or a family member (children) qualify for the disability tax credit?	YES	NO	YES	NO
	Were you required to work from home due to COVID 19? Number of Days _____	YES	NO	YES	NO
	Any other credits or deductions? Please check each one. <input type="checkbox"/> Donations <input type="checkbox"/> Political Contributions <input type="checkbox"/> Volunteer Firefighting <input type="checkbox"/> Student Loan Interest <input type="checkbox"/> Moving Expenses <input type="checkbox"/> Digital News Subscription <input type="checkbox"/> Northern Living Allowance				

Notes: Please provide any other information your tax preparer might need here.

I certify that all the information I have provided is true, complete, correct to the best of my knowledge.
Signature of person providing information: _____ **Date** _____

The purpose of this letter is to set out a clear understanding of the nature of my involvement as the preparer of your (and your family's) personal income tax return(s) and your responsibilities as the taxpayer.

IT IS UNDERSTOOD AND AGREED THAT MY ROLE AS YOUR TAX RETURN PREPARER IS AS FOLLOWS:

- (a) **I will not audit, review, or otherwise attempt to verify** the accuracy or completeness of any information provided. It is up to you to provide me with accurate and complete information necessary to prepare such personal income tax return(s).
- (b) I will include in your (and your family's) personal income tax return(s) the following statement together with my firm's name identified as the preparer of your tax return:

Prepared solely for income tax purposes without audit or review from information provided by the taxpayer.

- (c) We may ask for clarification of some of the information provided by you, in order to prepare your tax return accurately and correct.

IT IS UNDERSTOOD AND AGREED THAT YOUR RESPONSIBILITY AS THE TAXPAYER IS AS FOLLOWS:

- (a) The accuracy of the information and completeness of the representations reflected in your return is your responsibility under the *Income Tax Act*. You represent that the information supplied to me is, to your knowledge, correct and complete, and fully discloses all of your reporting requirements under the *Income Tax Act*. **You have the final responsibility for your income tax and should review it carefully before signing the completed return.**
- (b) **You will provide us with all the information required** to prepare complete and accurate. You confirm that you have provided me with all income and deduction items to be included in your tax return and that they are correct and complete. You confirm that all sources of income have been disclosed, all deductions were incurred to earn income, and all credits claimed are supported by receipts and you have provided me with those tax receipts.

Specific items

- All business (including commission, farming, and professional incomes) and rental schedules present the results of operations and include all material transactions.
 - All income and benefits from employment have been reported, whether or not they are on the T4 slips.
 - All incomes from investment (whether received or not) have been reported, whether or not they are on the T3 and T5 slips.
 - All dispositions of a capital nature, and their costs, have been reported.
 - All estimates for personal use of automobile, business portion of residence, and other such estimates you have provided are reasonable and supported by usage logs and other evidence.
- (c) **If additional information or facts arise after your return is filed**, you will need to file a request for adjustment to your return to the CRA. If you require assistance for such request, a minimum fee of \$20 will be charged.
- (c) If you owned certain property **outside of Canada** totalling more than \$100,000 at any time during the tax year, it may be necessary for you to declare such ownership in your tax return(s). There are substantial fines and penalties for non-compliance.

- You confirm that you have provided me with the correct and complete information with regards to ownership of, or beneficial interests in, specified foreign property as reported on the Foreign Income Verification Statement (T1135) and you have fully disclosed the related foreign income.

(d) You are not aware of any illegal or possibly illegal acts for which you have not disclosed to me all facts related thereto.

(e) I recommend that you provide me with copies of any correspondence you receive from CRA immediately. In many cases, reply deadlines apply, and if not met, proposed assessments or re-assessments may be issued or opportunities to challenge issues may be lost. Please let me know your preference at the time you deliver the information for preparation of your return(s), so I may indicate your preference when preparing your tax return(s).

(f) You will retain receipts, documentation and other information used to prepare your personal income tax return for a minimum of 7 years.

FEES

Upon completion of your income tax return or after providing advice or other service on any matters respecting same, I will render you a bill for services at our agreed upon price. It is agreed this invoice will be paid upon receipt. Any amounts outstanding will be charged interest at 1.67% per month (20% per annum).

The services and terms as set out above are as agreed. As well, I acknowledge and accept my responsibilities as the taxpayer as outlined above. This agreement stays in place each year I file with Raspberry North unless a new agreement is signed.

I consent to email communication via occasional newsletters, tax tips, or tax deadline requirements. You may opt out anytime.

If you agree to our terms outlined above, please sign the copy of this letter.

Raspberry North

X _____
Client Name (Print)

Date:

X _____
Client Signature

X _____
Client Name (Print)

Date:

X _____
Client Signature