

## CLIENT INFORMATION SHEET FOR TAX YEAR (s) \_\_\_\_\_

PLEASE PRINT CLEARLY

\*FOR NEW CLIENTS, PLEASE PROVIDE US WITH A COPY OF YOUR NOTICE OF ASSESSMENT\*

**Taxpayer 1 Name:** \_\_\_\_\_ SIN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Date of Birth: Year \_\_\_\_\_ MM \_\_\_\_\_ DD \_\_\_\_\_ Canadian Citizen: Yes  No

**Taxpayer 2/Partner Name:** \_\_\_\_\_ SIN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Date of Birth: Year \_\_\_\_\_ MM \_\_\_\_\_ DD \_\_\_\_\_ Canadian Citizen: Yes  No

**If tax return for partner/spouse is being prepared somewhere else, please answer the following:**

\*Is Partner's Net Income over \$20,000? Y  N  \*Do you have the lowest Net Income? Y  N

\*Who is claiming the non-refundable tax credits (family tax cut, children activities, etc)?: \_\_\_\_\_

**Taxpayer(s) Current Address** (This will be used by Revenue Canada to mail your notice of assessment.):

If you move (after filing your tax return), you need to update your address at 1-800-959-8281 or by mailing form RC325

Number & Street Name: \_\_\_\_\_ P.O. Box: \_\_\_\_\_ RR#: \_\_\_\_\_  
 City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code \_\_\_\_\_  
 Home Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

**Primary contact for this file:** \_\_\_\_\_ Preferred Method: Email/Home/Cell/ work

Work (1): (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_, Ext \_\_\_\_\_ Work (2): (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_, Ext \_\_\_\_\_

Cell Phone (1): (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone (2): (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

E-mail (1): \_\_\_\_\_ E-mail (2): \_\_\_\_\_

**Marital Status on Dec. 31:** If status changed during the tax year, enter date \_\_\_\_\_

Marital status changes during the year have to be reported to CRA by completing form RC65. If left unreported, there may be amounts owing to the child tax benefit, GST/HST, and other government programs that are based on household income.

If marital status changed, what was reported the prior year? \_\_\_\_\_  
 Married  Living Common-law  Widowed  
 Divorced  Separated  Single

\*Province of residence on Dec, 31 of tax year:  Ontario  Other \_\_\_\_\_

If your province of residence changed in the tax year, date of move? \_\_\_\_\_

\*Do you wish to provide Elections Canada with your current address information?  Yes  No

\*Did you **own or hold foreign property** (Real estate and/or Investments) at any time during the year with a total cost of more than CAN \$100,000?  Yes  No

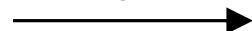
**Dependants (Other than Spouse or Partner) that resided with you in the tax year**

Please consider if someone else may claim your dependants in the same tax year. In cases of shared custody, parents usually alternate the claim for the dependant or agree to split them. When the same dependant is claimed by two people in the same tax year, CRA disallows the claim for both parents!

	First Name, Last Name (if different than yours)	Date of Birth YYYY /MM/DD	Is there a possibility of this dependant being claimed by someone else this tax year? YES/NO	Relationship to taxpayer (daughter, son, brother, etc)	Infirm or Disability to claim? YES/NO	Net Income (if applicable)
1.						
2.						
3.						

**How Did You Hear About Solution One Tax Service?**

I'm a Prior Client  Friends or Family  Website  Flyer/Postcard  Store Front Sign



**YOUR RESPONSE TO THESE GENERAL TAX QUESTIONS WILL HELP US MAXIMIZE YOUR TAX CREDITS & DEDUCTIONS.**  
 If you need any help, don't hesitate to contact us at 613-258-9492 or email at info@solutionone.ca. Thank You

Did you or your spouse/partner at any time during the tax year:		Taxpayer 1	Taxpayer 2
Income	Receive any <b>other taxable income</b> that is <b>not already reported</b> on your slips? <i>i.e. tips/gratuities, interest on your income tax refunds, foreign income, etc. If yes, provide details</i>	Yes No	Yes No
	Do you have any <b>income/expenses</b> from the following activities? <input type="checkbox"/> Self-Employment <input type="checkbox"/> Rental <input type="checkbox"/> Farming *If yes, please fill out the applicable worksheets!	Yes No	Yes No
Children	Receive the <b>Universal Child Care Benefit</b> ? Must be reported by the lower-net income earner in the family or starting in 2010, by one of the dependants of single parents. RC62 Slip required	Yes No	Yes No
	Pay for <b>child care</b> ? If yes, official receipts containing the name of the child and amounts paid will be required.	Yes No	Yes No
	Pay eligible <b>fees</b> for enrolling a child under 16 (or 18, DTC) in an eligible program? Weekly with a minimum duration of eight weeks; or daily with a minimum duration of five consecutive days. If yes, official tax receipts from the organization providing the program will be required.	Yes No	Yes No
	<b>Refundable Ontario Children's Activity Tax Credit</b> ? Includes instruction in arts, tutoring in school subjects, etc. <b>Non Refundable Federal Children's Fitness/Arts Amount</b> ? Applicable to physical and artistic activities!	Yes No	Yes No
1	Make <input type="checkbox"/> or Receive <input type="checkbox"/> <b>child or spousal support payments</b> ? If yes, the amount \$_____. <input type="checkbox"/> Child <input type="checkbox"/> Spousal <b>A copy of the support agreement and receipts are required.</b>	Yes No	Yes No
	Was the <b>agreement signed after May 1, 1997</b> ? Different tax rules may apply...	Yes No	Yes No
Tuition	Pay <b>tuition</b> for yourself or someone else? If yes, official tuition slip T2202 will be required.	Yes No	Yes No
	Wish to claim <b>tuition transferred</b> from someone other than your spouse/partner? If yes, signed tuition transfer slip with amounts to be transferred & student's info, including their net income will be required.	Yes No	Yes No
RRSP's	Make <b>contributions</b> to an <b>RRSP</b> from March to December of the tax year and the first 60 days of the following year? If yes, we need official receipts from financial institution	Yes No	Yes No
	Were you required to make a repayment under the <b>HBP or LLP Plans</b> ? This is money you borrowed from your RRSP to buy a home or to study. If yes, the designated repayment amount \$_____.	Yes No	Yes No
New Home	<b>Purchase a Home in Canada</b> after January 27, 2009? If you purchased a home for you or the benefit of a related individual entitled to the DTC, you may be eligible for the new <b>Non- Refundable Home Buyers Credit of \$5,000</b> . To qualify, you or the individual must be eligible for the DTC <b>or</b> you must be a first time home buyer or not have lived in another home owned by you or your partner in the year of acquisition or any of the 4 preceding years. If you wish to claim the credit, you'll need a purchaser's statement of adjustment from the lawyer.	Yes No	Yes No
Medical	Pay for <b>medical expenses, extended health/dental insurance premiums at work, and/or medical travel insurance</b> ? Medical expenses include prescriptions, glasses, dental care, trips of more than 40 kms to see a doctor or specialist, and any other medical expense not covered by OHIP or private insurance plans, as well as, renovations to your home required due to a medical condition or disability. <b>You need more than 3% of your (or your partner's) net income in medical expenses before you can make a claim.</b> If yes, receipts and/or insurance claim statements will be required. You can request a yearly report from the pharmacy for your prescriptions and use your last pay stub to prove the health and dental premiums paid at work. <b>After March 4, '10, teeth whitening &amp; other cosmetic procedures are not eligible!</b>	Yes No	Yes No
2	Wish to claim the <b>New First-Time Donor's Super Credit</b> ? To qualify, you nor your spouse (if applicable) have claimed any donations for tax years after 2007 (2008 to current year). Only gifts of money made after March 20, 2013, to a maximum of \$1,000, are eligible. Claim of the credit can be shared with spouse. Valid for 2013-2017 tax years.	Yes No	Yes No
3	Will you be <b>Splitting your Pension Income</b> with your spouse or common-Law partner? If yes, we'll optimize the amount to be split and review it with you before submitting your tax return.	Yes No	Yes No
4	Pay <b>rent</b> <input type="checkbox"/> or <b>property tax</b> <input type="checkbox"/> for your home in Ontario and wish to claim the <b>Ontario Trillium Benefit</b> ? If so, rent receipts, cancelled cheques, or property tax bill are required.	Yes No	Yes No
	<b>Wish to continue</b> <input type="checkbox"/> <b>monthly payments</b> Or <b>change to</b> <input type="checkbox"/> <b>One payment in June 2016</b>		
Seniors	Pay <b>property tax</b> for your home in Ontario and wish to apply for the <b>Senior Home Owners' Property Tax Grant</b> ? Amount of Grant receive the prior year: \$_____ To qualify for the grant you or your partner need to be 64 years old or over. Property tax bill is required.	Yes No	Yes No
DTC	-Do you or a family member (including children) suffer from a <b>Permanent Disability or Impairment in Physical or Mental Functions (New Family Caregiver Amount)</b> ?	Yes No	Yes No
	Do you wish more information how to apply for a Disability Tax Credit Certificate?	Yes No	Yes No
5	<b>Sell an investment property or shares</b> which may cause a <b>capital gain or loss</b> ?	Yes No	Yes No
6	Have <b>job-related expenses</b> while employed? If yes, employees must have a signed T2200 & Solution One's Employee Expense Summary Worksheet and truck drivers must have a completed Form TL2.	Yes No	Yes No
7	<b>Any Other Credits / Deductions</b> ? Donations, Public Transit Fees, Political Contributions, Interest on Student Loans (OSAP), Moving Expenses, Volunteer Firefighter, Home Renovation Expenses over \$1,000 (Jan/27/09 to Jan/31/10, Healthy Homes Renovations for seniors (Started on Oct11/11)?	Yes No	Yes No

I certify that all the information that I have provided is true, complete, and correct to the best of my knowledge. I accept that payment for the preparation of the tax return(s) is due upon completion and prior to any information being submitted to CRA.

SIGNATURE of person providing information: \_\_\_\_\_ DATE \_\_\_\_\_

## Letter of Engagement

We appreciate the opportunity to work with you and advise you on income tax matters. Canada Revenue Agency (CRA) impose penalties upon taxpayers, and upon us as tax return preparers, for failure to observe due care in reporting your income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns and other related work to confirm the following:

- a) You will **provide us with all the information** required to prepare complete and accurate tax returns. We will not audit, review or otherwise attempt to verify the accuracy or completeness of any information provided.
- b) **We may ask you for clarification** of some of the information provided by you. It is our responsibility to prepare your tax return correctly according to the law and the information that you have provided.
- c) You have the **final responsibility** for the income tax return and, therefore, you should review it carefully before you sign it. We provide this review during our Tax Return Review meeting. (in person, by phone or online)
- d) Your **personal income tax** return will include the following statement *“Prepared without audit from information supplied by the taxpayer”* along with our firm name identified as your tax preparer.
- e) If the income tax return **contains any business schedules** where we compile the figures, we will include with such forms or schedules the following statement:

*“Prepared without audit from information supplied by the taxpayer.  
Readers are cautioned that this statement may not be appropriate for their purposes.”*

\*Note: CRA requires a vehicle **Mileage Log** for reviews or Audits if you use your vehicle for both business and personal use.

\*Please **inform us** if you require us to prepare and file your **HST return**.

- f) You are required to include details with respect to the ownership of all your assets in foreign countries which exceed CAD **\$100,000** (i.e. foreign bank accounts, investments, share of foreign corporations, real and tangible property situated outside of Canada etc.) We will assume that you have no such possessions if you do not provide any information. There are substantial fines and penalties for non-compliance.
- g) We do **not provide U.S. tax services**. Please advise if you are a U.S. citizen or green card holder and we will refer you to a firm that can assist you.
- h) We strongly advise that you **provide us with copies of any correspondence** you receive from Canada Revenue Agency 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. Plus potential penalties.
- i) You will **retain receipts**, documentation and other information used to prepare your personal income tax return for not less **than 7 years** from the date of filing. We keep copies only of documentation necessary to support information contained in the return compiled by ourselves. Please retain all information relevant to your personal income tax return preparation, as it may be necessary in case of future audits by the tax authorities.
- j) You understand that the **law provides penalties for understated tax liabilities**.
- k) **CRA requires all tax preparers in Canada to e-file** all tax returns on behalf of their clients. Solution One adheres to this requirement. There are cases where a return will not qualify for e-filing for technical

reasons. Should this apply to you, we will inform you of the need to paper-file your return and make arrangement for timely filing.

- l) Unless informed differently, we are not aware of **any illegal or possibly illegal** acts for which you have not disclosed to us all facts related thereto.
- m) **Privacy policy and our accuracy guarantee** are on our website, [www.SolutionOne.ca](http://www.SolutionOne.ca) for you to review.
- n) **Our professional fees will be based on our regular billing rates plus direct out-of-pocket expenses** and applicable HST. Fees for additional services will be established separately. All invoices are due and payable upon presentation. Your return will not be filed until payments have been received. We accept Visa, MasterCard, debit or cash, email transfers sent to [info@solutionone.ca](mailto:info@solutionone.ca)
- o) Your tax returns will be filed with CRA. As part of its administrative procedures, **CRA, on a sample random basis, subsequently requests receipts** from certain taxpayers to corroborate certain information reported in the tax return. This process is not considered a CRA audit of your return. You are required to respond to these requests in a timely fashion. Typically, these requests occur in the summer and fall months, but on occasion will be required before CRA assesses your return. All your original documents will be returned to you, thereby enabling you to respond to such requests with relative ease. However, should you choose to seek our assistance to respond to such requests, minimum fees of \$65.00 + HST or \$50/hour whichever is greater will apply.
- p) **CRA is increasingly active with full scope audits** of certain areas of taxpayer's tax returns (**real estate, business, carrying charges, etc.**). When asked to provide assistance in such situations, it is understood that we will be billing you at our standard hourly rates. We suggest you keep this in mind when seeking our assistance with CRA matters in order to avoid unpleasant surprises. It is also important to note that our fees will apply whether or not our involvement yields favorable results with the CRA. Because of the uncertain nature and unpredictability of CRA audits, we will not be able to provide fixed fee estimates at the start of the audit. Our fees to prepare your tax return exclude any services pertaining to CRA audits, objections, appeals, etc. Minimum fees of \$65.00 + HST or \$50 to \$150/hour, whichever is greater, will apply.
- q) **If additional information** or facts arise subsequently to filing your tax return, you will need to file a **request for adjustment** to your return with CRA. If you seek our assistance for such requests, minimum fees of \$65.00 + HST or \$50/hour whichever is greater will apply.

**The arrangements outlined in this letter will continue in effect from year to year** unless changed by us. However, either party may terminate this agreement within 14 days of signing.

**You will be included in our mailing list** (paper & electronic) for purposes of communication and preparing your tax return, related work, updates, and newsletters. We will also record on occasion our telephone and in person meetings for quality control, compliance and training purposes.

**If the services outlined are in accordance with your requirements and if the above terms are acceptable to you, please sign the copy of this letter in the space provided and return it to us at your final Tax Return Review meeting.**

### **Solution One Wealth Management Inc.**

X \_\_\_\_\_  
Client Signature

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

\_\_\_\_\_  
Client Name (Print)

X \_\_\_\_\_  
Client Signature

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

\_\_\_\_\_  
Client Name (Print)