

Client Information Form 2022 Tax Year

This package must be completed in full before our office can start your tax return.

One package per household.

<p>TAX PAYER 1 (Last) _____ (First) _____ SIN _____</p> <p>(Home #) _____ Birth Date yyyy ____ mm ____ dd ____</p> <p>(Work #) _____ Canadian Citizen Y <input type="checkbox"/> N <input type="checkbox"/></p> <p>(Cell #) _____ May Canada Revenue Agency provide your name, address and SIN to Elections Canada to keep the voters list up to date? Y <input type="checkbox"/> or N <input type="checkbox"/></p> <p>(Email) _____</p>																																																							
<p>MARITAL STATUS <input type="checkbox"/> Married <input type="checkbox"/> Common Law <input type="checkbox"/> Divorced</p> <p>Date of status change in 2022 mm ____ / dd ____ <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Single</p>																																																							
<p>TAX PAYER 2 (spouse/partner) (Last) _____ (First) _____ SIN _____</p> <p>(Home #) _____ Birth Date yyyy ____ mm ____ dd ____</p> <p>(Work #) _____ Canadian Citizen Y <input type="checkbox"/> N <input type="checkbox"/></p> <p>(Cell #) _____ May Canada Revenue Agency provide your name, address and SIN to Elections Canada to keep the voters list up to date? Y <input type="checkbox"/> or N <input type="checkbox"/></p> <p>(Email) _____</p>																																																							
<p>ADDRESS <input type="checkbox"/> Own (Please attach 2022 property taxes) <input type="checkbox"/> Rent (Please attach 2022 rent receipts)</p> <p><input type="checkbox"/> Other (Please explain) _____</p> <p><input type="checkbox"/> Sold Principal Residence in 2022 Address: _____ Year of Original Acquisition _____ Proceeds of Disposition: _____</p>																																																							
<p>Current Home Address</p> <p>Apt. # _____ Street _____</p> <p>_____</p> <p>City _____ Prov. _____</p> <p>Postal Code _____</p>	<p>Mailing Address (check if same as home) <input type="checkbox"/></p> <p>Apt. # _____ Street _____</p> <p>_____</p> <p>City _____ Prov. _____</p> <p>Postal Code _____</p>																																																						
<p>DEPENDANTS</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;"></th> <th style="width: 20%;"></th> <th style="width: 20%;"></th> <th style="width: 10%;"></th> <th style="width: 10%;"></th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td>1. _____</td> <td>_____/_____/_____</td> <td>SIN _____</td> <td>_____</td> <td>_____</td> <td>Y <input type="checkbox"/> N <input type="checkbox"/></td> </tr> <tr> <td style="font-size: small;">Name</td> <td style="font-size: small;">DOB (yyyy/mm/d)</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>2. _____</td> <td>_____/_____/_____</td> <td>SIN _____</td> <td>_____</td> <td>_____</td> <td>Y <input type="checkbox"/> N <input type="checkbox"/></td> </tr> <tr> <td style="font-size: small;">Name</td> <td style="font-size: small;">DOB (yyyy/mm/dd)</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>3. _____</td> <td>_____/_____/_____</td> <td>SIN _____</td> <td>_____</td> <td>_____</td> <td>Y <input type="checkbox"/> N <input type="checkbox"/></td> </tr> <tr> <td style="font-size: small;">Name</td> <td style="font-size: small;">DOB (yyyy/mm/dd)</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>4. _____</td> <td>_____/_____/_____</td> <td>SIN _____</td> <td>_____</td> <td>_____</td> <td>Y <input type="checkbox"/> N <input type="checkbox"/></td> </tr> <tr> <td style="font-size: small;">Name</td> <td style="font-size: small;">DOB (yyyy/mm/dd)</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>								1. _____	_____/_____/_____	SIN _____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>	Name	DOB (yyyy/mm/d)					2. _____	_____/_____/_____	SIN _____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>	Name	DOB (yyyy/mm/dd)					3. _____	_____/_____/_____	SIN _____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>	Name	DOB (yyyy/mm/dd)					4. _____	_____/_____/_____	SIN _____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>	Name	DOB (yyyy/mm/dd)				
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<p>FOR OFFICE USE ONLY CLIENT TRACK __ T1 __ QUICKBOOKS _</p>																																																							

PROVIDED A COPY OF 2021 NOTICE OF ASSESSMENT? Y or N

ELECTED SPLIT-PENSION INCOME? Y N

ANY FAMILY MEMBER(S) DISABLED? Y N

FIRST TIME HOME BUYER? Y N

US TAX RETURN TO BE FILED? Y N

RRSP HOME BUYER'S PROGRAM? Y N

FILE SELF-EMPLOYED HST RETURN? Y N

RRSP LIFELONG LEARNING PLAN? Y N

DID YOU HAVE ANY SELF EMPLOYMENT
IN 2022 Y N

FOREIGN PENSION RECEIVED? Y N

SPOUSAL SUPPORT RECEIVED Y PAID Y N/A
Amount _____ per _____

CHILD SUPPORT RECEIVED Y PAID Y N/A
Amount _____ per _____

DO YOU HAVE A STUDENT IN POST SECONDARY
Y N

TUITION TRANSFER? Y N

Agreement with Precision Accounting Professional Corp.

We will prepare your personal income tax return(s) (including family members and all previous and future tax years) based on information that you provide to us and electronically file your return(s) if allowable. We will not audit, review or otherwise verify the data you submit, although we may ask you for clarification of some of the information. It is our responsibility to prepare your tax return correctly according to the law and the information that you have provided. It is your responsibility to provide us with all the information required to prepare complete and accurate returns. You should retain all the documents, cancelled 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 CRA. You have the final responsibility for the income tax return and, therefore, you should review it carefully before you sign it.

You confirm that you have informed us of all interests you held in foreign properties with a combined cost in excess of \$100,000 Cdn. at any time in the year, as well as all income from any foreign properties regardless of their aggregate value and all income and transactions relating to non-resident trusts.

Precision Accounting Professional Corp. respects 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. We follow rigorous privacy practices and we have a privacy policy that governs our use and handling of the information you provide to us.

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.

All invoices are due and payable upon presentation.

I accept the above terms and authorize Precision Accounting Professional Corp. to prepare my personal income tax return(s).

Signed by: _____ Date: _____

Signed by: _____ Date: _____

Foreign Income Verification Statement (T1135)

Declaration

Please choose one of the following with regards to Foreign Property Held in 2022 (foreign property includes funds held outside of Canada, shares of foreign companies even if held in a Canadian brokerage account (not in an RRSP), loans to non-residents, interests in non-resident trusts, real estate outside of Canada (other than personal use real estate) and any other property held outside Canada):

- A. No – I did not have any foreign property with a total cost of more than \$100,000CAD at **any** point in 2022.
- B. Yes – I did have foreign property during 2022 with a total cost of more than \$100,000CAD. I will prepare and file the form myself and I am aware of the potential \$2,500 penalty applied by the CRA if the form is not filed by the filing deadline of my personal tax return. I understand that the form is due by April 30, 2023 and must be mailed to the CRA.
- C. Yes – I did have foreign property during 2022 with a total cost of more than \$100,000CAD. I will obtain the required information for Precision Accounting to prepare the form. I understand that the completion of the form is not included in my 2022 quote to prepare my personal tax return and agree to pay the additional fees incurred to prepare the T1135 Form.

Signature

Date

Signature

Date

**2022 Tax Year
Personal Income Tax Checklist
Precision Accounting Professional Corp**

Please use the checklist below to make sure you have included all of the documents for your taxes:

<ul style="list-style-type: none"> ✓ CRA Assessments: <ul style="list-style-type: none"> ○ Last year's Notice of Assessment ○ Instalment Payments ✓ Employment Income: <ul style="list-style-type: none"> ○ T4 ○ T4A ○ T4PS ✓ Employment Expenses: <ul style="list-style-type: none"> ○ T2200 plus a list of the expenses ✓ Pension Income: <ul style="list-style-type: none"> ○ T4A ○ T4AOAS ○ T4AP ○ T4RIF ○ T4RSP ✓ Investment Income: <ul style="list-style-type: none"> ○ T3 ○ T5 ○ T5008 ○ T5013 ✓ Capital Gains: <ul style="list-style-type: none"> ○ T5013 ○ Trading summaries from Brokers ○ Annual statement from Mutual Funds 	<ul style="list-style-type: none"> ✓ Other Income: <ul style="list-style-type: none"> ○ Rental income and expense information ○ Self-Employment income and expense information (CPP contributions / EI premiums) ○ COVID-19 benefits ✓ Deductions and Credits: <ul style="list-style-type: none"> ○ RRSP (must be official receipts) ○ Child care receipts ○ Adoption expenses ○ Support payment information ○ Disability support deduction ○ Caregiver/disability amount ○ Moving expenses ○ Tuition fees – T2202/2202A ○ Student Loan Interest slips ○ Union/Professional dues ○ Labour sponsored funds – T5006/EVCC30 ○ Monthly bus passes – seniors only ○ New Home Buyers ○ Investment advice and accounting fees paid ○ Interest on investment loans ○ Ontario Staycation Tax Credit ○ Donations (must be official receipts) ○ Instalment payment information ○ Medical/Dental/Optical receipts (less any reimbursements from Insurance) ○ Premiums paid to Private/Travel Medical Insurance plans
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