

Bluenose Accounting Personal Tax Intake - Taxation Year (税务年度) 2025

Last Name (本人) 姓: _____ First Name 名: _____ SIN 工卡号: _____ Birth Date 生日: MM/DD/YYYY

Last Name (配偶) 姓: _____ First Name 名: _____ SIN 工卡号: _____ Birth Date 生日: MM/DD/YYYY

Address 地址: _____

City 城市: _____ Province 省: _____ Post Code 邮编: _____

Phone 电话:(H)家 _____ (C)手机 _____ (W)工作 _____

Email address 邮件地址: _____ Citizenship 国籍: _____

Marital Status 婚姻状况: Married 已婚 Single 单身 Common-Law 事实婚姻 Separated 分居 Divorced 离异 Widowed 丧偶

Did marital status change during the year & date 2025 年如婚姻状况改变, 日期: MM/DD/YYYY

First time home buyer & date of purchase 2025 年是否第一次在加拿大买房, 日期: MM/DD/YYYY

Principle residence sales & purchase/sales documents 2025 年是否出售主居屋, 购买及出售文件: _____

Dependant Information (please check all that apply) 子女/依靠您支持的亲属信息

Name 姓, 名	Relationship 关系	Date of Birth 生日	SIN 工卡号	T4/T4A 收入	DTC approved by CRA CRA 认定残疾	Post-secondary Education 大学学费(T2202A)	Attends Daycare/ Preschool 幼儿园/学前班
		<u>MM/DD/YYYY</u>					
		<u>MM/DD/YYYY</u>					
		<u>MM/DD/YYYY</u>					

DO YOU HAVE ANY FOREIGN PROPERTY/INVESTMENTS/STOCKS (Includes US stocks invested through Canadian brokers)

是否拥有海外资产/投资/股票, 包括通过加拿大经纪投资的美国股票 Yes _____ No _____

The following information only apply to immigrants or emigrants in 2025 下列信息只在 2025 年移入或移出加拿大适用:

Immigrate/Emigrate date 移入/移出加拿大日期: MM/DD/YYYY

Earnings before entry/earning after departure 当年移入加拿大前的收入/移出加拿大后的收入: _____

Comments 补充说明:

Prior Year Tax Information 上一年度税务申报信息

- Tax return(s) from last year filed 上一年度个税申报拷贝
- Last year's Notice of Assessment 上一年度税务评估

Income 收入或税单种类

- | | |
|---|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> T4 slips <input type="checkbox"/> T4A (pension/self-employment/commissions) <input type="checkbox"/> T4E (employment insurance) <input type="checkbox"/> T5007 (social assistance) <input type="checkbox"/> T4AP (Canada pension plan benefits) <input type="checkbox"/> T4A (OAS) old age security <input type="checkbox"/> T4A(RCA) retirement compensation arrangement <input type="checkbox"/> T4PS (statement of employee profit-sharing plan) <input type="checkbox"/> T4RSP (registered retirement savings plan) <input type="checkbox"/> T4 RIF (registered retirement income fund) | <ul style="list-style-type: none"> <input type="checkbox"/> T3 (income from trust allocations) <input type="checkbox"/> T5 (investment income) <input type="checkbox"/> T5013(A) (partnership income) <input type="checkbox"/> T5008 (income from security transactions) <input type="checkbox"/> Sale of stocks/bonds (attach gains/loss statement) <input type="checkbox"/> Support payments received (attach support agreement) <input type="checkbox"/> Foreign income <input type="checkbox"/> Self-employment (attach list of revenue/expenses) <input type="checkbox"/> Rental income (attach list of revenue/expenses) |
|---|---|

Deductions/Credits (attach receipts) 扣除/抵免种类 (附上收据)

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> RRSP contributions (include first 60 days of current year receipts) <input type="checkbox"/> First Home Savings Account contributions <input type="checkbox"/> Childcare expenses for each child <input type="checkbox"/> Child fitness and arts receipts <input type="checkbox"/> Medical expenses <input type="checkbox"/> Charitable donations and political contributions <input type="checkbox"/> Union and professional dues <input type="checkbox"/> Support payments made—attach support agreement <input type="checkbox"/> Disability tax credit approved by CRA <input type="checkbox"/> Multigenerational Home Renovation <input type="checkbox"/> T2202 (Tuition/education amounts) - signed if | <p>transferring</p> <ul style="list-style-type: none"> <input type="checkbox"/> Student loan interest statement <input type="checkbox"/> Employment expenses – signed T2200 attached <input type="checkbox"/> Interest paid to earn investment income <input type="checkbox"/> Teacher's school supplies receipts <input type="checkbox"/> New home buyers' amount – attach purchase agreement <input type="checkbox"/> Volunteer firefighter/search & rescue - attach statement <input type="checkbox"/> Accounting fees (investment income) <input type="checkbox"/> Moving expenses <input type="checkbox"/> Northern Resident Deduction |
|--|--|

Personal Income Tax Engagement Letter 个人所得税业务协议函

Thank you for choosing Bluenose Accounting for preparing and filing your personal tax (T1) return(s). This letter summarizes our mutual responsibilities required to file honest and accurate T1 Return(s), by the tax filing deadline of April 30 for most individuals, and June 15 for Self-Employed individuals and their spouse or common law partner. These deadlines will be moved to the Monday following these dates if the deadline(s) fall on a weekend.

感谢您选择 Bluenose Accounting 为您准备并提交个人所得税 (T1) 申报表。本函概述了我们双方的责任，以确保在报税截止日期之前提交真实、准确的 T1 申报表。大多数个人的截止日期为 4 月 30 日，而个体经营者及其配偶或普通法伴侣的截止日期为 6 月 15 日。如果截止日期正好是周末，则顺延至下一个工作日。

To ensure your understanding of our mutual responsibilities, we request all our personal tax clients to carefully read, then sign, and return this engagement letter to us. (One family member may sign for the entire family.) We will not start any work on your tax file until we receive this signed letter.

为了确保您了解我们的共同责任，我们要求所有个人税务客户仔细阅读本函，并签字后交还给我们。（一位家庭成员可以代表整个家庭签署。）在收到本签署函之前，我们不会开始处理您的税务文件。

Tax Services 税务服务

We will prepare the T1 Return(s) based solely on the information you provide to us. It is your responsibility to supply us with, in a timely manner (at a minimum of 7 days prior to the deadline), complete and accurate information so your T1 Return(s) will be filed by the tax filing deadline.

Otherwise, you may incur late filing penalties and interest charges from CRA. Please use our attached, detailed Tax Checklist(s) that apply to your situation to ensure accuracy and completeness. Please review and provide any changes to personal information such as your address.

我们将仅根据您提供的信息准备 T1 申报表。您有责任 及时提供完整、准确的信息（至少在截止日期前 7 天 提交），以便我们能够按时提交申报表。否则，您可能会因 迟交 而被加拿大税务局（CRA）处以罚款和利息。请使用随附的详细税务清单以确保信息的完整性和准确性，并更新您的个人信息（例如地址更改等）。

Bluenose Accounting will endeavor to identify potentially missing income sources (slips) by comparing prior years' tax returns and referencing CRA's client account information pages but will not be liable for any income or deductions for which no support has been provided by you the client.

Bluenose Accounting 将尽力识别可能缺失的收入来源（如税单），通过比较往年申报表并参考 CRA 客户账户信息页面。但对于未提供相关证明的收入或扣除项，我们不承担任何责任。

We do not audit the data you provide to us, although we may ask for clarification for some information. You may help minimize fees by providing us with all the information upfront, without making changes or adjustments. If we receive additional information or slips after we have your T1 prepared, and need to make changes to the return, additional charges may be applicable.

我们不会对您提供的数据进行审计，但可能会要求您澄清某些信息。请尽可能 一次性提供完整的信息，减少修改，以避免额外费用。如果我们在申报表准备后收到新的税单或信息需要修改申报表，可能会收取额外费用。

As required by law, you must keep accurate records, as well as the supporting documents, as required by law, for any home office, self-employed, employment expenses or rental property expenses you are claiming.

如果您申报家庭办公室、自雇收入、雇员支出或租赁物业费用，您必须 保持准确记录并保存相关凭证。

We agree to perform the following tax services:

我们提供以下税务服务：

- Preparation of the T1 Return(s), including the various federal and provincial schedules
- T1 申报表（包括联邦及省级附表）
- Other applicable tax filings, such as, T1135, T2091, T1032, HST (self-employed) return
- 其他适用的税务申报，例如：T1135（海外资产申报）、T2091、T1032、HST（自雇）申报

You are responsible for disclosing whether or not you own foreign property, (foreign bank accounts, shares in foreign corporations, real or other tangible property outside of Canada) with a combined cost of more than \$100,000.00 CAD. If this is applicable to your tax situation, you must provide us with a list of such properties so we may file the T1135, Foreign Income Verification Statement, with your T1 by the tax filing deadline of April 30. Penalties for not filing this form on time are significant.

如果您持有海外资产（如外国银行账户、外国公司股份、海外房地产或其他资产），且总价值超过 100,000 加元，您必须向我们提供详细清单，以便我们在 4 月 30 日之前提交 T1135（海外收入申报表）。如果未按时提交，该表格将面临高额罚款。

Legislation to Combat Money Laundering and Terrorist Financing 反洗钱和反恐融资法律

The Canadian federal government has enacted the Proceeds of Crime (Money Laundering) and Terrorist Financing Act (the Act). The Act implements specific measures to detect and deter money laundering and terrorist financing activities. The Act supports the investigation and prosecution of money laundering and terrorist financing offences, including requirements for CPAs to report suspicious transactions. For more information, please see [FINTRAC's act and regulations](#).

加拿大联邦政府制定了《反洗钱和反恐融资法》。该法律要求会计师事务所识别并报告可疑交易，以打击洗钱和恐怖主义融资活动。如需详细信息，请参阅 [FINTRAC 法规](#)。

Disclosing Confidential Client Information 客户信息保密

The Rules of Professional Conduct for CPAs and CPA firms establish a duty of confidence that obliges us to keep confidential all information about the business and affairs of our clients, unless our clients authorize us to release the information, or we are required by law or a court to do so. When we prepare the returns for spouses and/or other family members, the person that has engaged us to prepare the T1 Returns (the person who signs this engagement letter), will have access to all T1 Returns for the family, either through our portal, or by picking up paper copies. This will remain in effect for the current tax season. If you, or any members of your family for whom we are preparing T1 returns, are not in agreement with this, you are to notify us in writing before work begins on the T1 Returns. The Proceeds of Crime (Money Laundering) and Terrorist Financing Act requires us, by lawful authority, to disclose certain client information. Nonetheless, to comply with our duty of confidence, we will ensure that we report or record only the information that is required under the Act, and we will carefully comply with the required manner of reporting and recording financial transactions.

按照加拿大注册会计师（CPA）职业道德准则，我们有义务对客户业务和财务信息严格保密。除非获得您的授权，或法律/法院要求，否则我们不会披露您的任何信息。如果我们为配偶或家庭成员准备 T1 申报表，则签署本协议的人（即聘请我们服务的人）将可以访问整个家庭的申报表（通过门户网站或纸质副本）。如您或您的家人对此不同意，请在工作开始前以书面形式通知我们。同时，根据《反洗钱和反恐融资法》的要求，我们可能需要向政府机构披露部分信息，但我们仅报告法律规定的信息，并严格遵守相关法律规定的格式和方式。

Transmission of Documents by Electronic Means (Client Portal and Email) 电子文件传输（客户门户与电子邮件）

We prefer to receive paperwork in hard copy and to provide you with paper copies of your returns. However, our secure portal is an alternate and convenient way for us and our clients to electronically send documents securely. We can upload your copy of the T1(s) as well as any forms requiring your signature(s) to the portal. Once you have reviewed the T1(s), you may send back the signed forms through the portal. We request that you limit the amount of tax slips and receipts that are submitted electronically to a minimum. A processing fee will be charged for retrieving, sorting and printing electronic documents, as this does add time to the tax preparation process. If you have a large amount of tax slips and receipts, please drop them off at our office during regular business hours. For after-hours, you may use our drop box located at the building's main entrance.

我们更倾向于接收纸质文件，并为您提供纸质副本的申报表。然而，我们的安全门户也是一种便捷的电子文件传输方式，可用于您与我们之间的安全文件交换。我们可以将您的 T1 申报表副本以及需要您签署的表格上传至安全门户。在您审核完 T1 申报表后，可通过门户提交已签署的表格返还给我们。我们要求尽量减少通过电子方式提交的税务单据和收据。电子文件的处理可能需要额外费用，因其增加了税务准备时间。如果您有大量的税务单据或收据，请送达或使用下班后的投递箱。

Electronic Filing (E-Filing) and Consent 电子申报与授权

The CRA requires all tax preparers in Canada to e-file all tax returns on behalf of their clients. There are cases where a T1 does not qualify for e-filing. If this applies to you, we will notify you of the need to paper-file the return. Before e-filing a T1 return, CRA requires us to obtain a signed T183 consent form from you (and each of your family members for whom we are preparing a tax return.). Please ensure you (and any family members) are available to sign the forms so the T1(s) may be filed on time.

CRA 要求所有税务准备人员通过电子报税提交 T1 申报表。部分 T1 申报表可能不符合电子报税要求，如适用，我们会通知您改用纸质报税。电子报税前，CRA 要求客户签署 T183 授权表，请确保您及家人能及时签署该表，以保证申报按时提交。

Fees for Services 服务费用

Our invoice will be included with your tax return(s) and must be paid before we submit the T1(s) to CRA. We accept Debit, Etransfer, cheque or cash. We may request a retainer for prior year return preparation.
我们的费用将随申报表一同提供，且必须全额支付后才能向 CRA 提交 T1 申报表。我们接受借记卡、电子转账（E-Transfer）、支票或现金支付。如果需要准备往年未申报的税务，可能需要支付预付款。

Pick-up of Paperwork 文件领取

Any paperwork, including T1 copies, T-slips, receipts, etc. that are not required for Bluenose Accounting to keep, but are being returned to our clients, must be picked up in a timely manner. Bluenose Accounting does not have the storage space available, therefore these documents will be shredded after 6 months. Arrangements can be made for a courier of your choice to pick up documents, or postal services, though any associated charges are your responsibility.
任何不属于 Bluenose Accounting 存档的文件（如 T1 副本、税务单据、收据等），必须及时领取。我们仅保留 6 个月，逾期未领取的文件将被销毁。您可安排快递或邮寄领取文件，但相关费用由您承担。

Signature 签名事项

If you have any questions regarding the contents of this letter, please do not hesitate to contact us. If you are in agreement with the contents of this letter, please sign and return it to our office.
如果您对本协议的内容有任何疑问，请随时与我们联系。如您同意本函内容，请签字并交回我们的办公室。

We look forward to serving you (and your family) for your personal tax preparation needs.
我们期待为您（及您的家庭）提供专业的个人报税服务！

Yours truly,
敬启，

Bluenose Accounting



I agree with the terms of your engagement as the preparer of my (our) tax return(s).
我同意 Bluenose Accounting 作为我的（或我们家庭的）税务申报服务机构，并接受本协议的条款。

Print name 姓名: _____

Signature 签字: _____

Date 日期: _____

（注：对于家庭报税，一个家庭成员签字即可代表全家。签字部分不可打字代替）