

New Client Personal Tax Intake – Taxation Year(s) _____
One form per couple)

Name: _____ SIN: _____ Birth Date: _____
First Last year/mm/dd

Spouse: _____ SIN: _____ Birth Date: _____
First Last year/mm/dd

Spouse or Common-Law Partner net income if tax return is not prepared by Bluenose Accounting: _____

Address: _____

Email(s): _____

Phone Numbers: _____

MARTIAL STATUS Married Single Common-Law Separated Divorced Widowed
If changed in the year, please provide date): _____
(year/mm/dd)

DEPENDENT INFORMATION

<u>Name/Relationship</u>	<u>Date of birth</u> <small>year/mm/dd</small>	<u>SIN</u>	<u>T4/T4A</u>	<u>Disability Tax Credit</u> <small>approved by CRA</small>	<u>Tuition</u>	<u>Daycare</u> <small>(incl. preschool)</small>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DID YOU DISPOSE OF PROPERTY IN THE YEAR? Yes No

IF YES, WAS IT YOUR PRINCIPAL RESIDENCE? Yes No If Yes, see Note 1 on back

DO YOU OWN FOREIGN PROPERTY/INVESTMENTS/STOCKS? (INCLUDES US) Yes No
Own/hold any foreign property costing more than \$100,000?
(including US stocks invested through Canadian brokers)

ARE YOU A CANADIAN CITIZEN? Yes No

DID YOU IMMIGRATE TO OR EMIGRATE FROM CANADA IN 2024? Not applicable
If you moved to Canada in 2024, what was your date of entry? _____
year/mm/dd
If you moved out of Canada in 2024, what was your date of departure? _____
year/mm/dd

DO YOU WANT TO PROVIDE NAME, ADDRESS, DOB AND CITIZENSHIP INFORMATION TO ELECTIONS CANADA? Yes No



Prior Year Tax Information

- Tax return(s) from last year filed
- Last year's Notice of Assessment

Income

- | | |
|---|--|
| <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 pension <input type="checkbox"/> Self-employment (attach list of revenue/expenses) <input type="checkbox"/> Rental income (attach list of revenue/expenses) |
|---|--|

Deductions/Credits (attach receipts)

- | | |
|--|---|
| <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 | <ul style="list-style-type: none"> <input type="checkbox"/> T2202 (Tuition/education amounts) - signed if transferring <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 |
|--|---|

Note 1: Disposition of principal residence

If you sold your principal residence in the tax year, please complete the following:

Address of the property: _____

Year of acquisition: _____ Sale Price: _____

Was it your principal residence the entire time? (e.g. used as rental): _____

Is the property jointly owned with spouse/other? No Yes - If yes, split %: _____

IMPORTANT

Please read the attached Engagement Letter. We will start work on your file once we receive the signed and dated letter, thank you.

Personal Income Tax Engagement Letter

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.

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.*

Tax Services

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 14 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. To ensure accuracy and completeness, please use our attached, detailed Client intake form as well as any other intake forms that apply to your tax situation. Returning clients, please provide any changes to personal information such as your address on your Returning Client Intake form.

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.

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.

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

We agree to provide the following tax services:

- Preparation of the T1 Return(s), including the various federal and provincial schedules
- Other applicable tax filings, such as, T1135, T2091, T1032, HST (self-employed) return

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.

Legislation to Combat Money Laundering and Terrorist Financing

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](#)

Disclosing Confidential Client Information

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.

Transmission of Documents by Electronic Means (Client Portal and Email)

We prefer to receive paperwork in hard copy. However, our portal is an alternate way for our clients to electronically send documents securely. 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.

Once the tax return(s) have been completed and are ready for your signature(s), your T1 copy and forms requiring your signature(s) will be uploaded to your secure portal. Printed copies of your tax return and forms to sign are also available. Please indicate on our Personal Tax Intake form if you prefer electronic or paper copies.

Electronic Filing (E-Filing) and Consent

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.

Fees for Services

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, E-transfer, cheque or cash. We may request a retainer for prior year return preparation.

Pick-up of Paperwork

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 3 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.

If you have any questions regarding the contents of this letter, please do not hesitate to contact us. If you agree with the contents of this letter, please sign and return it to our office.

We look forward to serving you (and your family) for your personal tax preparation needs.

Yours truly,

Bluenose Accounting

I agree with the terms of your engagement as the preparer of my (our) tax return(s).

Print name _____

Signature* _____

Date _____

*For families, a signature from one family member applies to the whole family