Bluenose Accounting
Chartered Professional Accountants

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

Name/Relationship	Date of birth year/mm/dd	SIN	T4/T4A	Disability Tax Credit approved by CRA	Tuition	Daycare (incl. preschool)
________________	___________	___________	☐	☐	☐	☐
________________	___________	___________	☐	☐	☐	☐
________________	___________	___________	☐	☐	☐	☐
________________	___________	___________	☐	☐	☐	☐

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)

DID YOU OPEN A FIRST HOME SAVINGS ACCOUNT IN 2023? Yes ☐ No ☐

DID YOU MAKE A CONTRIBUTION IN 2023? Yes ☐ No ☐

ARE YOU A CANADIAN CITIZEN? Yes ☐ No ☐

DID YOU IMMIGRATE TO OR EMIGRATE FROM CANADA IN 2023? ☐ Not applicable

If you moved to Canada in 2023, what was your date of entry? ______________________
year/mm/dd

If you moved out of Canada in 2023, 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

- ☐ T4 slips
- ☐ T4A (pension/self-employment/commissions)
- ☐ T4E (employment insurance)
- ☐ T5007 (social assistance)
- ☐ T4AP (Canada pension plan benefits)
- ☐ T4A (OAS) old age security
- ☐ T4A(RCA) retirement compensation arrangement
- ☐ T4PS (statement of employee profit-sharing plan)
- ☐ T4RSP (registered retirement savings plan)
- ☐ T4 RIF (registered retirement income fund)
- ☐ T3 (income from trust allocations)
- ☐ T5 (investment income)
- ☐ T5013(A) (partnership income)
- ☐ T5008 (income from security transactions)
- ☐ Sale of stocks/bonds (attach gains/loss statement)
- ☐ Support payments received (attach support agreement)
- ☐ Foreign pension
- ☐ Self-employment (attach list of revenue/expenses)
- ☐ Rental income (attach list of revenue/expenses)

Deductions/Credits (attach receipts)

- ☐ RRSP contributions
  (include first 60 days of current year receipts)
- ☐ First Home Savings Account contributions
- ☐ Childcare expenses for each child
- ☐ Child fitness and arts receipts
- ☐ Medical expenses
- ☐ Charitable donations and political contributions
- ☐ Union and professional dues
- ☐ Support payments made–attach support agreement
- ☐ Disability tax credit approved by CRA
- ☐ Multigenerational Home Renovation
- ☐ T2202 (Tuition/education amounts) - signed if transferring
- ☐ Student loan interest statement
- ☐ Employment expenses – signed T2200 attached
- ☐ Interest paid to earn investment income
- ☐ Teacher's school supplies receipts
- ☐ New home buyers' amount – attach purchase agreement
- ☐ Volunteer firefighter/search & rescue - attach statement
- ☐ Accounting fees (investment income)
- ☐ Moving expenses
- ☐ 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 %: _____________________________

Additional Information

____
____
____
____
____

Personal Income Tax Engagement Letter

Thank you for choosing Bluenose Accounting for preparing and filing your 2023 personal tax (T1) return(s) along with other years if requested.

This letter summarizes our mutual responsibilities required to file honest and accurate T1 Return(s), by the tax filing deadline of April 30,2024 (Self-employed deadline of June 17, 2024). The contents of this letter will remain applicable from year to year unless it is changed by you, or us, in writing.

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, 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.

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.

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.

We agree to perform the following tax services:

- Preparation of the T1 Return(s), including the various federal and provincial schedules, for the taxation period ending December 31, 2023.
- 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 (canada.ca)

Underused Housing Tax

By signing this engagement letter, you understand and are aware of the new Underused Housing Tax (UHT), and whether or not it applies to you and your personal situation. If you would like to engage our firm to complete and file a UHT return on your behalf, it is your responsibility to engage us for this service. We will not be held responsible for any missed filings due to a lack of awareness of personal information not shared with us about your personal property ownership, besides principal residence ownership. If you have questions regarding UHT and if you bare any filing requirements, please contact us for more information.

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.

Portal Usage

We prefer to receive paperwork in hard copy and to provide you with paper copies of your returns. However, our secure portal is a 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). Once you have reviewed the T1(s), you may send back the signed forms through the portal.

We request that you limit the portal uploads of tax slips and receipts to a minimum. A processing fee will be charged for excess portal usage as retrieving and sorting electronic documents 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 next to our door.

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.

Signature

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.

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 by one family member applies to the whole family.