Form A - Client Information

This form must submitted with all tax returns

Print Form

Welcome to the TaxbyFax.ca client information form. This form consists of three (4) pages that include the following:

Page 1 (This Page - *Form A*): Personal information and checklist for sources of income.
Page 2: Checklist for deductions and tax credits. Tax preparation payment information, engagement consent and final checklist.
Page 3: (*Form B*) Canada Revenue Agency T183 Electronic Filing consent form for client.
Page 4: (*Form C*) Canada Revenue Agency T183 Electronic Filing consent form for spouse (if applicable).

Please complete all applicable area's and use the checklist on the bottom of page 2 prior to submission to our office.

Income Tax Year 2010

E-Mail:

○ Mr. ○ Mrs ○ Ms.

Social Insurance No

First Name

Last Name

Address

City

Prov

Postal Code

Marital Status as of Dec 31 ○ Single ○ Married ○ Seperated ○ Widowed ○ Divorced

Date of Birth

Home Phone #

Work Phone #

Alternate Phone #

Spouses Information

○ Mr. ○ Mrs ○ Ms.

Social Insurance No

First Name

Last Name

Address

City

Prov

Postal Code

Home Phone #

Date of Birth

Dependents

Dependant 1 Name	Date of Birth	Social Insurance No	Net Income
Dependant 2 Name	Date of Birth	Social Insurance No	Net Income
Dependant 3 Name	Date of Birth	Social Insurance No	Net Income
Dependant 4 Name	Date of Birth	Social Insurance No	Net Income

Income Sources (check all that apply and include required documents)

- ☐ Employment Income (attach T4, T4A slips or details)
- ☐ Pension Income (attach T4AP, T4OAS slips or details)
- ☐ Unemployment insurance benefits (attach T4E slips or details)
- ☐ Canada Savings Bonds (attach purchase, sale & income details)
- ☐ Treasury Bills (T-BD slip and purchase cost details)
- ☐ Self employment income/loss (complete and submit form C) *
- ☐ Fishing income/loss (complete and submit form D) *
- ☐ WCB Income (attach T5008 or details)
- ☐ Alimony/child support received in the amount $
- ☐ Employment Income (attach T4/T4A or details)
- ☐ RRSP withdrawls (attach T4RSP slips or details)
- ☐ Investment Income (attach T3, T5, T600 slips or details)
- ☐ Capital gains/losses (complete and submit form E) *
- ☐ Rental income/loss (complete and submit form F) *
- ☐ Farming income/loss (complete and submit form G) *
- ☐ Limited partnership income/loss (attach T5018 or details)
- ☐ Foreign income (attach details in foreign currency)
- ☐ Other Income. Desc:

<u>* Forms B through F are available from TaxByFax.ca website</u>

Form A - Client Information

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Social Insurance No

First Name

Last Name

Deduction and Tax Credits (check all that apply and include required documents)

- ☐ RRSP Contributions (attach RRSP slips). Amount $
- ☐ Professional and Union dues (not on T4). Amount $
- ☐ Charitable Donations (attach receipts). Amount $
- ☐ Medical expenses (Note 1). Amount $
- ☐ Repayment of EI Benefits (attach T4E slips)
- ☐ Child care expenses. Amount $
- ☐ Education expenses (attach T2202 slips)
- ☐ Moving expenses (complete and attach Form G) *
- ☐ Employment expenses (complete and attach Form H & T2200) *
- ☐ Alimony/deductiable Child support paid. Amount $
- ☐ Interest/Investment carrying charges. Amount $
- ☐ Disability deduction (attach Form T2201).
- ☐ Provincial Tax Credit (attach applicable information slips).
- ☐ Losses during the year. (attach details or form D).

Other Information (check all that apply and include required documents)

- ☐ T1 Personal tax installments. Amount $
- ☐ Losses from previous years. (attach details).
- ☐ Prior reassessments. (Attach reassessment notices).
- ☐ Prior T1 Refund interest. Amount $

Payment Information. Please contact 604-463-8202 or 1-800-557-9254 for the preparation fee

○ Visa ○ Mastercard Credit Card Number Expiry Date Preparation Fee $

Clients consent and engagement. Must be signed by client and spouse (if applicable).

Choquette & Company Accounting Group Inc. (Accountant) will prepare our personal income tax returns based on information we will present to the accountant. The accountant will not audit or otherwise verify the data we submit, although the accountant may ask us for clarification of some of the information. It is the accountants responsibility to prepare our tax return correctly according to the law and the information that we have provided. It is our responsibility to provide the accountant with all the information required to prepare complete and accurate returns. We will retain all the documents, cancelled cheques and other data that form the basis of our income and deductions. These may be necessary to prove the accuracy and completeness of the return to Canada Revenue Agency (CRA). We have the final responsibility for the income tax return. By signing this letter, we represent that we will provide the accountant with accurate and complete information necessary to prepare our tax return. This includes informing the accountant of all interests we hold in foreign properties with an aggregate cost in excess of $100,000 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. We understand that the law imposes various penalties when taxpayers understate their tax liability. We understand that CRA may select our return for review. Often they request copies of the taxpayer receipts and other times they may require a full audit. Any adjustments proposed by CRA are subject to certain rights of appeal. In the event of such tax examinations, we understand the accountant will be available upon request to represent us. Additional fee's will be charged for such representation. We understand the accountants fee for services shall be based on our fee schedule plus out-of-pocket expenses. All invoices are due and payable upon presentation. By signing this letter we agree that the liability of the accountant (Choquette & Company Accounting Group Incorporated), it's directors, officers, accountants, employee's and agents will be the maximum of the fee (net of taxes) charged for the preparation of our returns.

Client Signature Spouse's Signature Date

Submission information

Prior to sending your information to our office by facsimile, please use this checklist to make sure that you have included everyting required in order for our office to prepare your tax returns. Any missing information will delay the processing time of your return:

- ☐ 1: Enter your personal information
- ☐ 2: If applicable, enter your spouses information
- ☐ 3: If applicable, enter your dependents information
- ☐ 4: Check off source of income and include slips/forms
- ☐ 5: Check off deductions/credit and include slips/forms
- ☐ 6: Complete payment information. (Page 2)
- ☐ 7: Read and signed engagement section (Page 2)
- ☐ 8: Sign Canada Customs consent forms (Page 3 and 4)
- ☐ 9: Ensure all slips and forms are included.
- ☐ 10: Fax all documents to our office for preparation.

Facsimile: 604-463-8210 or Toll-Free: 1-888-242-8210

Notes:

Canada Customs and Revenue Agency | Agence des douanes et du revenu du Canada

INFORMATION RETURN FOR ELECTRONIC FILING OF AN INDIVIDUAL'S INCOME TAX AND BENEFIT RETURN

Form B

Taxpayer to Complete

- Before you complete this form, read the information and instructions on the back.
- You have to complete this form to allow your electronic filer to electronically file your 2007 tax return.
- You have to complete parts **A**, **B**, and **F**. You choose whether you want to complete parts C, D, and E.
- Your electronic filer has to complete parts **G** and **H**.
- Give the signed original of this form to your electronic filer, and keep a copy for yourself.

Part A - Identification and address as shown on your 2007 return

First name and initial	Last name	Social insurance number

Mailing address: Apt. No. – Street No. Street name

P.O. Box	R.R.	City	Prov./Terr.	Postal code

Part B - Declaration

Enter the following amounts from your 2007 return, if applicable:

Total income (line 150)

Taxable income (line 260)

Total federal non-refundable tax credits (line 350 of Schedule 1)

Information to be inserted by TaxByFax.ca upon completion.

Part C - Direct deposit (optional)

To start direct deposit, or to change banking information you already gave us, complete this part. Do **not** complete this part if you already use direct deposit and your banking information has not changed.

Tick the payments you want deposited directly.

	Branch	Institution number	Account number
☐ Tax refund and GST/HST credit ☐ Canada Child Tax Benefit (CCTB) and payments from certain related provincial or territorial programs to the **same** account			
or			
☐ CCTB and payments from certain related provincial or territorial programs to a **different** account			

Part D - Alternative address authorization (optional)

Complete this part if you want us to mail your *Notice of Assessment and your tax refund*, or only your *Notice of Assessment*, to you at the address of the electronic filer named in Part G. Tick the appropriate box to tell us which information to mail to the electronic filer's address. Read the back of this form for more details.

☐ 2007 *Notice of Assessment* and tax refund **or** ☐ 2007 *Notice of Assessment*

Part E - Authorizing an electronic filer to represent you (optional)

☒ I authorize the Canada Revenue Agency to deal with the electronic filer named in Part G as my representative for income tax matters of my 2007 return. This authorization will expire on (no expiry date). Read page 2 of this form for more details.

If you do not show an expiry date, this authorization will remain in effect until you, the undersigned, cancel it.

Signature (individual identified in Part A) Date

Part F - Declaration and authorization

I declare that the information in Part A and the amounts shown in Part B above are correct and complete, and fully disclose my income from all sources. I also declare that I have read the information on the back of this form, and I authorize the electronic filer identified in Part G to electronically file my 2007 return and to communicate with the Canada Revenue Agency to correct any errors or omissions.

Signature (individual identified in Part A) Date

Your electronic filer has to complete parts G and H.

Part G - Electronic filer identification

By signing Part F above, the individual in Part A authorizes the following person or firm to electronically file his or her 2007 return. Part F **must be signed** before the return is electronically transmitted.

Name of person or firm: Choquette and Company Group Inc.

Electronic filer number: A2411

Part H - Document control number or confirmation number

Enter the document control or confirmation number for the individual's electronic record:

Taxpayer to complete Part A, E and F.