



Intake Form and Engagement and Foreign Asset and/or Principal Residence Disclosure Representation Letter

Please kindly **complete** this form and the engagement and foreign asset disclosure representation letter (one for each client) - *page 3 and 4* - and bring it in with your tax information! Thank you.

DATE _____ E-mailed Portal Mailed Couriered Dropped Off

For office use only.

1. CLIENT NAME (Last) _____ (First) _____ SIN _____

Tel # (Home) _____ Birth Date yyyy ____ / mm ____ / dd ____

(Work) _____ Canadian Citizen Y or _____

(Cell) _____ Elections Canada* Y or N

Please select ONE principal contact number

(Email) _____

2. SPOUSE NAME (Last) _____ (First) _____ SIN _____

Tel # (Home) _____ Birth Date yyyy ____ / mm ____ / dd ____

(Work) _____ Canadian Citizen Y or _____

(Cell) _____ Elections Canada* Y or N

Please select ONE principal contact number

(Email) _____

*If **Yes** is indicated, you authorize CRA to forward your name, address and date of birth to Elections Canada to update information on the *National Register of Electors*.

ADDRESS

Apt # _____ Street _____

City _____ Prov _____

Postal Code _____

TAX RETURN . . .

Will Pick Up **RHN Portal** ** **Secure Email**

Mail to - Address Shown **Other** (fill out below)

**Name of portal _____

MARITAL STATUS Married Common Law Divorced Separated Widowed Single

Date of status change in 2017 mm ____ / dd ____

Please continue on next page ↗

For office use only: **Tax Year** _____

DEPENDENTS

1.	_____	____/____/____	(____)	SIN _____
	Name	DOB (yyyy/mm/dd)	M/F	
2.	_____	____/____/____	(____)	SIN _____
	Name	DOB (yyyy/mm/dd)	M/F	
3.	_____	____/____/____	(____)	SIN _____
	Name	DOB (yyyy/mm/dd)	M/F	
4.	_____	____/____/____	(____)	SIN _____
	Name	DOB (yyyy/mm/dd)	M/F	
5.	_____	____/____/____	(____)	SIN _____
	Name	DOB (yyyy/mm/dd)	M/F	

ELECTED SPLIT-PENSION INCOME? Y <input type="checkbox"/> or N <input type="checkbox"/>	NEW HOME BUYER? Y <input type="checkbox"/> or N <input type="checkbox"/>
VOLUNTEER FIREFIGHTER / SEARCH AND RESCUE? Y <input type="checkbox"/> or N <input type="checkbox"/>	ANY FAMILY MEMBER(S) DISABLED? Y <input type="checkbox"/> or N <input type="checkbox"/> (Including Type 1 diabetes)
HOME ACCESSIBILITY RENOVATIONS? Y <input type="checkbox"/> or N <input type="checkbox"/>	ARE YOU A U.S. CITIZEN? Y <input type="checkbox"/> or N <input type="checkbox"/>
DID YOU SELL A PROPERTY? Y <input type="checkbox"/> or N <input type="checkbox"/> (If yes, please provide details under Notes section below)**	ARE YOU FILING A U.S. TAX RETURN? Y <input type="checkbox"/> or N <input type="checkbox"/>
PREPARE GST/HST RETURN? Y <input type="checkbox"/> or N <input type="checkbox"/> (Confirm online access, if not, print RC59) Check here if done <input type="checkbox"/>	DID YOU PURCHASE SUPPLIES AS AN ELIGIBLE EDUCATOR? Y <input type="checkbox"/> or N <input type="checkbox"/>
For office only: Complete GST filing instructions on intake sheet.	DO YOU OR ANY DEPENDANTS HAVE TYPE 1 DIABETES? Y <input type="checkbox"/> or N <input type="checkbox"/>
	DIRECT DEPOSIT WITH CRA? Y <input type="checkbox"/> or N <input type="checkbox"/> Already Set Up <input type="checkbox"/> New <input type="checkbox"/> (VOID Cheque)

Notes

- **Principal residence – please provide,
- Year acquired
 - Proceeds
 - Ownership %
 - Full Address of Property

Please continue on next page ⇨



Engagement Letter

I wish to confirm the following arrangements in respect of my **2018** personal income tax return and T1135 Foreign Income Verification Statement, if applicable, which I engage **Reid Hurst Nagy Inc. (RHN)** to prepare.

1. I have provided the required information to complete my return. This includes, but is not limited to, T3, T4, and T5 slips, other information slips, summaries of income and expenses relating to any business or rental property, receipts and vouchers, cancelled cheques and other information necessary.
2. **RHN** will return all original tax receipts unless instructed otherwise. **It will be my responsibility to retain my tax receipts for 7 years.**
3. **RHN** will prepare my personal income tax return (including all previous and future tax years) based on information I provide and will electronically file my return if allowable. **RHN** will not audit, review or otherwise verify the data I submitted, although I may be asked for clarification on some of the information. **RHN** will prepare my personal income tax return correctly according to the rules and regulations of the law.
4. I understand **RHN** respects the privacy of personal information. I agree to provide personal information necessary - that is, information that identifies me as an individual. I also agree that I have obtained consent from others for whom I have provided **RHN** with personal information for collecting, using and disclosing this information, according to privacy legislation*. **RHN** follows rigorous privacy practices and governs the use and handling of the information provided to them.
5. I accept the fees for services, plus out-of-pocket expenses. Invoices will be paid upon presentation.
6. I understand that I will be responsible if there are any penalties imposed for inaccurate and/or late returns.
7. I agree to indemnify, defend (by counsel retained and instructed by us) and hold harmless **RHN**, and its partners, agents or employees, from and against any and all losses, costs (including solicitors' fees), damages, expenses, claims, demands or liabilities in the event that CRA seeks to impose a third-party civil liability penalty on the us that stems from reliance on information provided.
8. **RHN** is not responsible for taxes, interest and/or penalties related to information not provided or inaccurate information.
9. I accept responsibility for the accuracy of the information provided to **RHN** and the above terms and agreement.

[Signed] _____

[Date] _____

[Print name] _____

*For more information, please visit our website www.rhncpa.com or contact our privacy officer at 604-273-9338 or by email at info@rhncpa.com.

Please continue on next page ↷

Please provide one signed form for each taxpayer



Foreign Asset and/or Principal Residence Disclosure Representation Letter

With respect to the foreign property and/or principal residence disclosure and reporting rules, **by checking the appropriate box(es) below**, I, [Name]_____ confirm that I understand the issues and potential significant penalties for non-disclosure or failing to complete the prescribed forms by the due date of the return (April 30 or June 15 for self-employed individuals). If the foreign property and/or principal residence disclosure and reporting rules are applicable, I acknowledge that the completion of either Form T1135 and/or Form T1142 and/or Form T2091 are separate engagements to which additional fees will apply. I confirm that:

Foreign Assets

- I have **no** assets that qualify as foreign assets or I **have** assets that qualify as foreign assets and the cost amount did **not exceed** \$100,000 Canadian at any time during **2018**. Do **not file** Form T1135 *Foreign Income Verification Statement*.
- I **have** assets that qualify as foreign assets and the cost amount **did exceed** \$100,000 Canadian at some time during **2018**. Please **file** Form T1135 *Foreign Income Verification Statement*.

Foreign Trusts

- I **am not** a beneficiary of a non-resident trust in which I had an absolute or conditional right as a beneficiary. Do **not file** Form T1142 *Information Return in Respect of Distributions From and Indebtedness Owed to a Non-Resident Trust*.

I am a beneficiary of a non-resident trust in which I had an absolute or conditional right as a beneficiary.

- I have **not** received funds or property from, or been indebted to, the trust. Do **not file** Form T1142 *Information Return in Respect of Distributions From and Indebtedness Owed to a Non-Resident Trust*.
- I **have** received funds or property from, or been indebted to, the trust. Please **file** Form T1142 *Information Return in Respect of Distributions From and Indebtedness Owed to a Non-Resident Trust*.

Principal Residence Designation

- I have **not** disposed of, or was considered to have disposed my principal residence or any part of it or granted someone an option to buy my principal residence, or any part of it in **2018**. Do **not file** Form T2091 *Designation of a Property as a Principal Residence by an Individual (Other than a Personal Trust)*.
- I **have** disposed of, or was considered to have disposed my principal residence or any part of it or granted someone an option to buy my principal residence, or any part of it in **2018**. Please **file** Form T2091 *Designation of a Property as a Principal Residence by an Individual (Other than a Personal Trust)*.

Before signing this letter, I have reviewed the foregoing and have discussed with **RHN** any items that require clarification or appear incorrect in relation to the above.

[Date]_____

[Signed]_____