



## 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 send 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) \_\_\_\_\_ Date of Birth yyyy\_\_\_\_\_/mm\_\_\_\_\_/dd\_\_\_\_\_

(Work) \_\_\_\_\_ Canadian Citizen **Y** or \_\_\_\_\_

(Cell) \_\_\_\_\_ Elections Canada\* **Y** or **N**

**Please select one principal contact number**

(Email) \_\_\_\_\_ (If applies) Date of Death mm\_\_\_\_\_/dd\_\_\_\_\_

**2. SPOUSE NAME** (Last) \_\_\_\_\_ (First) \_\_\_\_\_ SIN \_\_\_\_\_

Tel # (Home) \_\_\_\_\_ Date of Birth 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*.

<p><b>ADDRESS</b></p> <p>c/o (if applicable) _____</p> <p>Apt. _____ No. _____ PO Box/RR _____</p> <p>Street/Blvd./Ave. _____</p> <p>City _____ Prov _____</p> <p>Postal Code _____</p>	<p><b>YOUR TAX RETURN . . .</b></p> <p><b>Pick Up</b> <input type="radio"/></p> <p><b>Electronic</b> – RHN Portal or <b>Secure Email</b></p> <p>Portal/Email: _____</p> <p><b>Mail To</b> – Address Shown or <b>Other</b> (fill out below) <input type="radio"/></p>
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**MARITAL STATUS**    Married    Common Law    Divorced    Separated    Widowed    Single

Date of status change in year \_\_\_\_\_ mm\_\_\_\_\_/dd\_\_\_\_\_

**Tax Year** \_\_\_\_\_

For office use only.





## Engagement Letter

I wish to confirm the following arrangements in respect of my **2020** 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.

[Print name] \_\_\_\_\_

[Date] \_\_\_\_\_

[Signature] \_\_\_\_\_

\*For more information, please visit our website [www.rhncpa.com](http://www.rhncpa.com) or contact our privacy officer at 604-273-9338 or by email at [info@rhncpa.com](mailto:info@rhncpa.com)



## Foreign Asset and/or Principal Residence Disclosure Representation Letter

### Foreign Assets (choose one)

I do **NOT** have foreign assets that **exceed** \$100,000 Canadian cost base, at any time during **2020**.

I **have** foreign assets that **did exceed** \$100,000 Canadian cost base, at some time during **2020**. Please **file** Form T1135.

### Foreign Trusts (choose one)

I **am not** a beneficiary of a non-resident trust.

I **am** a beneficiary of a non-resident trust, but have **not** received funds or property from, or been indebted to, the trust.

I **am** a beneficiary of a non-resident trust, and I **have** received funds or property from, or been indebted to, the trust. Please **file** Form T1142.

### Principal Residence Designation (choose one)

I have **not** sold or disposed of all or part of my principal residence in **2020**.

I **have** sold or disposed of all or part of my principal residence in **2020**. Please **file** Form T2091.

I 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). I further confirm this disclosure is applicable to any previous or future years' taxes filed by RHN unless I inform or have informed RHN in writing otherwise.

If the foreign property and/or principal residence disclosure and reporting rules are applicable, I acknowledge that the completion of either Form T1135 (*Foreign Income Verification Statement*) and/or Form T1142 (*Information Return in Respect of Distributions From and Indebtedness Owed to a Non-Resident Trust*) and/or Form T2091 (*Information Return in Respect of Distributions From and Indebtedness Owed to a Non-Resident Trust*) are separate engagements to which additional fees will apply.

[Print name] \_\_\_\_\_

[Date] \_\_\_\_\_

[Signature] \_\_\_\_\_

\*For more information, please visit our website [www.rhn CPA.com](http://www.rhn CPA.com) or contact our privacy officer at 604-273-9338 or by email at [info@rhn CPA.com](mailto:info@rhn CPA.com)