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** Denotes Professional Corporation*

Dear Valued Client,

Please (1) complete the following checklist and (2) provide us with all related support & a signed T1013 (*if you've not previously provided it to us*). Please note that if taxes are due to Canada Revenue Agency, they are due to be paid by **April 30, 2017**.

☆ ONGOING CLIENT(S) ☆ NEW CLIENT(S) *(We require a copy of your 2015 Return(s))*

GENERAL INFORMATION FOR YOU & YOUR SPOUSE / COMMON LAW PARTNER

GENERAL INSTRUCTIONS: If something applies below, click the appropriate box (☐ for You ○ for Your Spouse) to indicate that related information is included. Click on [i] for more information and click on [form] for access to CRA's form for the related item.

Ongoing client (only) option: **Same as last year?** ☐ ← (You) ○ ← (Your Spouse / Common Law Partner)

	Same as last year?	You	Your Spouse / Common Law Partner
Name:		______	______
Social Insurance Number:	☐	______	______
☐ Phone Number:	☐	______	______
☐ E-mail:	☐	______	______
Birthdate:	☐	______	______
Home Address:	☐	______	

Preferred?

Marital Status: ☐ Married ☐ C/Law ☐ Widowed ☐ Single ☐ Divorced ☐ Separated

Spouse's Net Income: *(If we are not filing their return)* ______

GENERAL INFORMATION FOR YOUR DEPENDENT(S)

(Ongoing Client? – Just list new dependents / changes)

	(1)	(2)	(3)
Child / Family Member Name:	______	______	______
Social Insurance Number:	______	______	______
Net Income:	______	______	______
Birthdate:	______	______	______
Filing a Return?	△ Yes △ No	△ Yes △ No	△ Yes △ No
Healthy?	△ Yes △ No	△ Yes △ No	△ Yes △ No
Child Arts / Fitness ?	△ Yes △ No	△ Yes △ No	△ Yes △ No

YOUR INCOME INFORMATION

☐ ○ ← **Please check to confirm 100% of slips you expect to receive are dropped off to us.**

T3 T4 T4A T4A(OAS) T4A(P) T4PS T4RIF T4RSP T4E RC62 RC210
T5 T5013 T5018 T5007 T5008 ← (T5008) *If the costs are not provided on the slip, please provide them to us.*

NOTE: If you are over 65 and collecting CPP and still working (receive a T4), you should complete a CPT30 so you no longer contribute to CPP.

☐ ○ Rental Property
☐ ○ Unincorporated Business Income & Expenses (Farm, Sole Proprietor, etc)
→ Are You Registered for GST? ☐ ○ Yes *If so, please ensure we have a signed RC-59*
→ What is your business website (if you have one)? ______

☐ ○ Capital Gains/Losses (outside TFSA, RRSP, etc)
☐ ○ Sale/changed use of Principal Residence in 2016
☐ ○ Other: ______

YOUR DEDUCTION INFORMATION

☐ ○ RRSP Contributions
☐ ○ Childcare
☐ ○ Acctg. / Invest. Mgt. Fees
☐ ○ Employment exp. *If so, you must have a signed T2200 (or TL2) from your employer*
→ NOTE: You only have employment expenses if you are deducting expenses against T4 income. These are not business expenses.

☐ ○ Annual dues
☐ ○ Moving expenses
☐ ○ Other: ______

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YOUR TAX CREDIT INFORMATION

☐	◯	Tuition (Cdn. / Foreign)	☐	◯	Interest on Student Loans
☐	◯	First Time Home Buyer	☐	◯	Home Accessibility
☐	◯	Public Transit	☐	◯	Caregiver
☐	◯	Donations	☐	◯	Medical Expenses
☐	◯	Early Child Educator	☐	◯	Other: ____________________________
☐	◯	Disability			*If so, you must have an approved form T2201 previously filed with CRA*

OTHER INFORMATION

☐	◯	Non-Resident of Canada	☐	◯	Newcomer to Canada
☐	◯	**You own foreign income property with a cost greater than $100,000**			
☐	◯	Final Return (2nd Checklist Needed)	☐	◯	Pension Income to Split?
☐	◯	Non-CDN Citizen	☐	◯	I am a US Citizen

Tax Installments made in the year: ☐ _______________ ◯ __________________

☐ ◯ **YES, I WOULD YOU LIKE TO PURCHASE HILLNCO'S CRA REVIEW PROTECTION FOR ONLY $15 (EACH)!**
If you would not like this protection, we will charge our hourly rate for this service – see our TERMS below.

Please sign below to **(1)** declare that you have provided us with complete and accurate information in order to complete your 2016 personal tax return, and **(2)** you agree to the terms below.

☐ ______________________ ◯ ______________________ ______________________

Signature Signature Date

In order to ensure that your taxes are completed by the appropriate deadline, we require all information to be provided to us at least two weeks prior to the applicable deadline. If your information is not provided to us within this time frame, we will still do all we can to complete it in time, but if it is late, any penalties and interest will be your responsibility.

Thank you for choosing Hill & Company Chartered Accountants LLP! If you have any questions, please do not hesitate to contact our office at 780-486-1459.

Sincerely,

Mark B. Hill, CA Jeff S. Wong, CA

TERMS:

We will prepare your 2016 personal income tax return based on information you provide to us. Although we may ask you for clarification of the information, we will not audit or otherwise verify the data you submit. It is our responsibility to prepare your tax return correctly according to the law and the information you provide to us. It is your responsibility to provide us with all the information required to complete an accurate return. You should retain all the documents, cancelled cheques and other data that form the basis of your income and deductions for seven years. These may be necessary to prove the accuracy and completeness of the return to CRA. **You have the final responsibility for the income tax return therefore you should review it carefully before you sign it.**

By signing this letter, you represent that you have provided us with accurate and complete information necessary to prepare your tax return. This includes informing us of all of your world-wide income and any interest you held in foreign income properties with an aggregate cost in excess of $100,000 at any time in the year.

As part of a self-assessed tax system, CRA regularly conducts review programs of various areas of individual taxes. Your return may be randomly selected as part of these review programs. We would be happy to assist you with responding to such programs on your behalf. **If you have not opted to use our CRA Review Protection (Reviews only – does not cover audits) as indicated above, the costs associated with this assistance will be billed separate from your personal tax preparation invoice and will be based on our hourly rate.**

Our fee for services is based on our fee schedule, plus expenses. **All invoices are due and payable prior to filing.**