

#101 17510-102 AVE EDMONTON, ALBERTA T5S 1K2  
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[WWW.HILLNCO.COM](http://WWW.HILLNCO.COM)

**MARK B. HILL\***, CA, MPACC, BMGT  
**JEFF S. WONG\***, CA, BMGT  
**MACGYVER R. USSHER, CA, BCOM**  
*\* Denotes Professional Corporation*

Dear Valued Client,

Please (1) complete the following checklist, (2) gather 100% of the related supporting documents, and then (3) provide us with the completed checklist and support in the order listed on the checklist.

Please note that if taxes are due to Canada Revenue Agency, they are due to be paid by **April 30, 2018**.

ONGOING CLIENT(S)       NEW CLIENT(S) *(We require a copy of your 2016 Return(s) & a signed [T1013](#))*

**GENERAL INFORMATION FOR YOU & YOUR SPOUSE / COMMON LAW PARTNER**

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

Preferred?

Name: \_\_\_\_\_  
 Social Insurance Number: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 E-mail: \_\_\_\_\_  
 Birthdate: \_\_\_\_\_  
 Home Address: \_\_\_\_\_  
 Marital Status:  Married     C/Law     Widowed     Single     Divorced     Separated  
 Spouse's Net Income: *(If we are not filing their return)* \_\_\_\_\_

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

**INCOME INFORMATION**

← Check this to indicate that 100% of applicable slips you expect to receive are dropped off to us. Examples of slips are:

[T3](#)     [T4](#)     [T4A](#)     [T4A\(OAS\)](#)     [T4A\(P\)](#)     [T4PS](#)     [T4RIF](#)     [T4RSP](#)     [T4E](#)     [RC210](#)  
 [T5013](#)     [T5](#)     [T5018](#)     [T5007](#)     [T5008](#) ← If the cost (box 20) is not provided on the T5008, please provide it to us.

Rental Income & Expenses        ★ Capital Gains/Losses (not on slip, or in TFSA, RRSP, etc.)   
  Unincorporated        Sale/changed use of Principal Residence in 2017   
  Other: \_\_\_\_\_  
 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)? \_\_\_\_\_

★ If you have unregistered investments, please provide a statement of holdings as at December 31, 2017. (NA for TFSA, RRSP, RESP accounts)

**DEDUCTION INFORMATION**








RRSP Contributions        Annual dues (other than on T4)   
  Childcare        Moving expenses   
  Acctg. / Invest. Mgt. Fees        Other: \_\_\_\_\_  
  Expenses as an Employee *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 unincorporated business expenses.

**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 *To claim this, you must have an approved form [T2201](#) previously filed with CRA*

Typically not available until after March 31

**OTHER INFORMATION**




- Non-Resident of Canada 
- Final Return ([2<sup>nd</sup> Checklist Needed](#)) 
- I am not a CDN Citizen 
- You own foreign income property with a cost greater than \$100,000**  
- Newcomer to Canada 
- Pension Income to Split? 
- 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.

**GENERAL INFORMATION FOR YOUR [DEPENDENT\(S\)](#)**

*(NOTE to Ongoing Clients: Just list new dependents / changes)*

	(1)	(2)	(3)
Dependent's Name:	_____	_____	_____
Relation:	_____	_____	_____
Social Insurance Number:	_____	_____	_____
Net Income for 2017:	_____	_____	_____
Birthdate:	_____	_____	_____
Filing a Return? 	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Healthy?  	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Please sign below to declare (1) that you have provided us with complete and accurate information in order to complete your 2017 personal tax return, and (2) that you agree to the terms below.**


Signature \_\_\_\_\_                     
  Signature \_\_\_\_\_                     
 \_\_\_\_\_ Date Signed

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 2017 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 (including foreign securities held with a Canadian broker) 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 of \$250/hour.**

Our fee for services is based on [our fee schedule](#), plus expenses. **All invoices are due and payable on pickup & prior to filing.**