

#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**  
*\* 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.

**ONGOING CLIENT(S)**     
  **NEW CLIENT(S)** *(We require a copy of your 2017 Return(s) & a signed T1013)*

Prices

Prices

\$150

\$150


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

	<input type="checkbox"/> (You)		<input type="checkbox"/> (Your Spouse / Common Law Partner)
Ongoing Client: Same?	Name _____	Social Insurance Number _____	Ongoing Client: Same?
<input type="checkbox"/>	Phone Number _____	Email Address _____	<input type="checkbox"/>
<input type="checkbox"/>	Birthdate _____		<input type="checkbox"/>

Home Address: \_\_\_\_\_

Marital Status:  Married  C/Law  Widowed  Single  Divorced  Separated



Date of Marital Status Change: \_\_\_\_\_ Spouse's Net Income: \_\_\_\_\_  
*(If applicable this year.) (If we aren't filing their return.)*

**GENERAL INSTRUCTIONS:** Click on the [HYPERLINKED TEXT](#) for more information and click on  for access to CRA's form for the related item. Check the box/circle below to indicate the item applies for you/your spouse. If it is left unchecked below, you are indicating that item does NOT apply.

**INCOME INFORMATION**

\$50-\$100  
 \$100-\$175  
 \$100-\$300  
 \$75



\$50-\$100  
 \$100-\$175  
 \$100-\$300  
 \$75

<input type="checkbox"/>	Yes, I have provided Hillnco with <b>100% OF MY INCOME SLIPS</b> for this year.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have <b>CAPITAL GAINS / LOSSES</b> outside of my TFSA/RRSP to report this year.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have a <b>RENTAL PROPERTY</b>  and have included 100% of the income and expenses.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have <b>UNINCORPORATED SELF-EMPLOYMENT</b>  and have included 100% of the rev. and exp.	<input type="checkbox"/>
<input type="checkbox"/>	GST Number for <b>HILLNCO TO FILE</b> Return _____	<input type="checkbox"/>
<input type="checkbox"/>	Website (for your self-employment) _____	<input type="checkbox"/>

**DEDUCTION INFORMATION**

\$100-\$200  
 \$100-\$225

\$100-\$200  
 \$100-\$225

<input type="checkbox"/>	Yes, I have made <b>RRSP CONTRIBUTIONS</b> (March 2, 2018 → March 1, 2019).	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have <b>CHILDCARE EXPENSES</b> and have included the supporting documents.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have <b>ACCOUNTING / INVESTMENT MANAGEMENT FEES / CARRYING CHARGES</b> .	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have <b>ANNUAL DUES / MEMBERSHIPS / LIABILITY INSURANCE</b> .	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have moved in the year and have <b>MOVING EXPENSES</b>  to claim.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have a <b>T2200 / TL2</b> from my employer and have included <b>EMPLOYMENT EXPENSES</b>  .	<input type="checkbox"/>


**TAX CREDIT INFORMATION**

<input type="checkbox"/>	Yes, I paid <b>TUITION</b> and have included my <b>CANADIAN / FOREIGN</b> tax slip.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I purchased my <b>FIRST HOME</b> in the year.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have made <b>DONATIONS</b> in the year and have included the official receipts.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have <b>MEDICAL EXPENSES</b> and have included the annual summaries for the year.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have a previously filed <b>T2201</b> with CRA and can claim the <b>DISABILITY TAX CREDIT</b> .	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have paid <b>INTEREST ON STUDENT LOANS</b> .	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have incurred eligible expenses for the <b>HOME ACCESSIBILITY</b> tax credit.	<input type="checkbox"/>

**OTHER INFORMATION**

\$100  
 \$250+  
 \$150-\$250

\$100  
 \$250+  
 \$150-\$250

<input type="checkbox"/>	I am <b>NOT A CANADIAN CITIZEN</b> but am a <b>RESIDENT</b> for tax purposes.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have <b>SOLD OR CHANGED THE USE OF MY PRINCIPAL RESIDENCE</b> this year.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, this is a <b>FINAL RETURN</b> and the completed <b>2<sup>nd</sup> Hillnco Checklist</b> is included.	<input type="checkbox"/>
<input type="checkbox"/>	<b>YES, I OWN FOREIGN INCOME PROPERTY WITH A COST OVER \$100,000 CAD</b>  .	<input type="checkbox"/>

*(This includes all income generating foreign property and foreign stock held with a registered Canadian Security Broker/Bank.)*

(You)

(Your Spouse / Common Law Partner)

**ADDITIONAL INFORMATION**

I have additional income / tax credits / deductions to claim as specified below.

\$ Sched

**OTHER INCOME / CREDIT / DEDUCTION:**

\$ Sched

**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 2018:	_____	_____	_____
Birthdate:	_____	_____	_____
Is Hillnco <b>FILING</b> their 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
Claim <b>DISABILITY/CAREGIVER</b> ?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Up to \$150 each

\$15

**YES, I WOULD YOU LIKE TO PURCHASE HILLNCO'S CRA REVIEW PROTECTION FOR ONLY \$15 (EACH)!**

If you would not like this protection and CRA selects any area of your return for review, we will still assist you, but will charge our hourly rate for this service – see our TERMS below.

\$15

Please sign below to declare (1) that you have provided us with complete and accurate information in order to complete your 2018 personal tax return, and (2) that you agree to the terms below.

Signature \_\_\_\_\_

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


\_\_\_\_\_ Signature

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, CPA, CA

  
Jeff S. Wong, CPA, CA

**TERMS:**

We will prepare your 2018 personal income tax return based on information you provide to us. Although we may ask you for clarification, 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 six 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 (1) Tax on Split Income 'TOSI' does not apply to any of your income, and (2) 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. If you feel that TOSI does apply, please provide the details to us prior to completing your return.**

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 the pricing above and **our fee schedule**. **All invoices are due and payable on pickup. Additional charges apply for personal tax amendments, and a \$25 admin fee applies for subsequent copy requests of your taxes / NOA.**