

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 2018 Return(s) & a signed T1013*)

Prices
\$150

Prices
\$150

GENERAL INFORMATION FOR YOU & YOUR SPOUSE / COMMON LAW PARTNER

Ongoing Client: Same?
 (You) Name _____ (Your Spouse / Common Law Partner)
Social Insurance Number _____
Phone Number _____
Email Address _____
Birthdate _____
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

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

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

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

DEDUCTION INFORMATION

<input type="checkbox"/>	Yes, I have made RRSP CONTRIBUTIONS (March 2, 2019 → March 2, 2020).	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have CHILDCARE EXPENSES and have included the supporting documents.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have ACCOUNTING / INVESTMENT MANAGEMENT FEES / CARRYING CHARGES .	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have ANNUAL DUES / MEMBERSHIPS / LIABILITY INSURANCE .	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have moved in the year and have MOVING EXPENSES to claim.	<input type="checkbox"/>
<input type="checkbox"/>	Yes, I have a T2200 / TL2 from my employer and have included EMPLOYMENT EXPENSES	<input type="checkbox"/>

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

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

TAX CREDIT INFORMATION

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

OTHER INFORMATION

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

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

\$100
\$250+

\$100
\$250+

(You)

(Your Spouse / Common Law Partner)

ADDITIONAL INFORMATION

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

Prices OTHER INCOME / CREDIT / DEDUCTION: Prices

GENERAL INFORMATION FOR YOUR DEPENDENT(S)

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

(1)

(2)

(3)

Dependent's Name: _____

Relation to You: _____

Social Insurance Number: _____

Net Income for 2019: _____

Birthdate: _____

Is HillInco **FILING** their Return? Yes No Yes No Yes No

PHYSICALLY or **MENTALLY INFIRM**? Yes No Yes No Yes No

Up to \$150 each

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

If you would not like this review 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.

Please sign below to declare (1) that you have provided us with complete and accurate information in order to complete your 2019 personal tax return, (2) that you agree to the terms below, and (3) that you authorize HillInco as your representative to access and file your tax information online with CRA.

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, 
Hill & Company Chartered Accountants LLP

TERMS: We will prepare your 2019 personal income tax return based on information you provide to us. **If your return requires bookkeeping, it will be billed at a rate of \$85/hour in addition to the fees outlined above.** 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 our 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 service 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.