

2023 Personal Intake Form

As the tax deadline of April 30th approaches, we are providing you with this intake form to assist in collecting the necessary information required for us to complete your personal tax return. Please review and complete all relevant fields and email your completed form to info@newrealmfinancial.com. If you have any questions, please do not hesitate to contact us.

☐ If you are a returning client with no changes made this year to your addresses, spouse, or dependants, please check this box.

PERSONAL SECTION

Full Legal Name	
Address	
City	Province
Postal Code	Phone Number
Date of Birth (dd/mm/yyyy)	Social Insurance Number
Email	

☐ Canadian Citizen? If answer yes, please check the box.

SPOUSE SECTION

Full Legal Name	
Address	
City	Province
Postal Code	Phone Number
Date of Birth (dd/mm/yyyy)	Social Insurance Number
Email	

☐ Canadian Citizen? If answer yes, please check the box.

Marital Status:

☐ Married
 ☐ Single
 ☐ Common-Law
 ☐ Divorced
 ☐ Widowed

If marital status changed during this tax year, provide date of change (dd/mm/yy): _____

DEPENDENTS

Full Legal Name	Social Insurance Number	Date of Birth (dd/mm/yyyy)

2023 Personal Intake Form

Please complete the form below in full before returning. **Provide all necessary tax slips / tax receipts / documentation** when submitting this intake form.

TAX RETURN

	YES	NO				
Did you contribute to an RRSP?						
Did you make any charitable donations?						
Do you have any medical expenses not covered by benefits?						
Did you pay interest on a student loan?						
Did you work from home in the tax year?						
If yes, please complete your <i>Expense Worksheet</i> .						
Do you have a disability tax certificate?						
Did you pay rent this year?						
If yes, complete the blanks below:						
<table border="1"> <tr> <th>Landlord Full Name</th> <th>Total Rent Amount, CAD</th> </tr> <tr> <td></td> <td></td> </tr> </table>	Landlord Full Name	Total Rent Amount, CAD				
Landlord Full Name	Total Rent Amount, CAD					
Are you a first time home buyer?						
If yes, complete the blanks below:						
Full Legal Address _____						
<table border="1"> <tr> <th>Date of Purchase (dd/mm/yyyy)</th> <th>Purchase Price, CAD</th> </tr> <tr> <td></td> <td></td> </tr> </table>	Date of Purchase (dd/mm/yyyy)	Purchase Price, CAD				
Date of Purchase (dd/mm/yyyy)	Purchase Price, CAD					
Did you sell your principal residence?						
If selected yes, complete the blanks below:						
1. Full Legal Address _____						
<table border="1"> <tr> <th>Date of Sale (dd/mm/yyyy)</th> <th>Sale Price, CAD</th> </tr> <tr> <td></td> <td></td> </tr> </table>	Date of Sale (dd/mm/yyyy)	Sale Price, CAD				
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2. Full Legal Address _____						
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Date of Sale (dd/mm/yyyy)	Sale Price, CAD					
Did you sell a property that is not your principal residence?						
If selected yes, please complete the <i>Capital Gains Worksheet</i> .						
Did you own foreign property at any time during the tax year with a total cost of more than \$100,000?						
Do you have rental income?						
If selected yes, is it commercial or residential? _____						
If selected yes, is it commercial or residential? \$ _____						
Please complete the <i>Rental Worksheet</i> .						

Do you consent to sending your information to Elections Canada?		
How did you hear about us?		
<ul style="list-style-type: none"> - Internet Search - Social Media - Family/Friend - Other _____ 		

Thank you for taking the time to complete this intake form. **Please provide all necessary tax slips / tax receipts / documentation** and send your completed intake form to **info@newrealmfinancial.com**

RESOURCES

Rental Worksheet

Capital Gains Worksheet

Expense Worksheet

2023 Accounting Engagement Letter

We appreciate the opportunity to work with you and advise you on income tax matters. The government agencies impose penalties on taxpayers, and upon us as tax return preparers, for failure to observe due care in reporting on income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns to confirm the following arrangements.

We will prepare your 2023 personal income tax returns based on the information that you provide to us. We will not audit or otherwise verify the data you submit, although we may ask you for clarification of some of the information.

It is our responsibility to prepare your tax returns correctly according to the law and the information you have provided. It is your responsibility to provide us with all the information required to prepare complete and accurate returns. You should retain all the documents, canceled cheques, and other data that form the basis of your income deductions. These may be necessary to prove the accuracy and completeness of the returns to CRA. You have the final responsibility for the income tax return and, therefore, you should review it carefully before signing.

By signing this letter, you represent that you will provide us with the accurate and complete information necessary to prepare your tax return(s). This includes informing us of all interest you held in foreign properties with an aggregate cost in excess of \$100,000 at any time of the year, as well as all income from any foreign properties regardless of their aggregate value and all income and transactions relating to non-resident trusts.

The law imposes various penalties when taxpayers understate their tax liability. If you would like information on the amount or circumstances of these penalties, please contact us.

CRA may select your return for a review and request copies of your receipts up to and including a full audit. Any adjustments proposed by CRA are subject to certain rights of appeal. In the event of such tax examinations, we will be available upon request to provide representation on your behalf.

Our fee for services is based on our fee schedule plus out-of-pocket expenses. All invoices are due and payable upon presentation.

If this letter accurately reflects your understanding, please acknowledge your agreement by signing and returning to us the enclosed copy. Please feel free to contact us with any questions or concerns at:
Tel: **437-994-8862** or email info@newrealmfinancial.com.

Sincerely,

Natalia Sharnevsky

New Realm Financial Inc.

By signing I have completed the forms in full with accurate information and attached all necessary documents.

Printed Name

Signature

Date

