



2024 Business Intake Form

As your corporate tax deadline approaches, we are providing you with this intake form to assist in collecting the necessary information required for us to complete your business 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.

GENERAL INFORMATION

Full Business Legal Name	Operating Name	CRA Business Number	RC

Business Address	Phone Number
City	Province
Email	Postal Code

Which of the following is your business? Sole Prop Partnership Corporation

If selected **corporation**, when is your year end date (dd/mm/yy): _____

Was this your first year of business? Yes No

Was this your last year of business? Yes No

What is the main product / service your business provides? _____

TAX RETURN

Is your bookkeeping completed for the tax year? Yes No

If **no**, bookkeeping to be reviewed before the return is approved for completion.

If **yes**, how is your bookkeeping completed? Excel spreadsheet Quickbooks online Other

If selected **Other** please specify: _____

HOME OFFICE EXPENSES

Total square footage of home:				sq. ft.
Total square footage used for business purposes:				sq. ft.
Annual mortgage interest amount:				\$
Home insurance amount:				\$
Annual property taxes amount:				\$
Utilities amount:				
Hydro	Gas	Water		
\$	\$	\$		
Internet amount:				\$
Telephone amount:				\$
Other:				\$

AUTO EXPENSES

Do you lease or finance?		
If lease , what is your monthly lease amount?		\$
If finance , please provide copy of <i>Purchase Agreement</i> .		
Total loan interest amount:		\$
Total kilometers driven in tax year:		km
Total kilometers driven for tax purposes:		km
Fuel amount:		\$
Repairs and maintenance amount:		\$
Dues and fees amount:		\$
Car insurance amount:		\$

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.



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2024 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 underestimate 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: **365-645-6500** or email info@newrealmfinancial.com.

Sincerely,

Nataliya Sharnevskyy

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