H&A ACCOUNTING

"Your Virtual and In-Person Accountants"

TAX CLIENT INTAKE FORM

TAX YEAR(S) 2024

☐ NEW CLIENT

☐ EXISTING CLIENT

Please complete the form in full prior to submitting. provide all necessary tax slips/ tax receipts/ documentation when submitting this intake form.

Personal Information Section

Full Legal Name

Address

City

Province/Terr.

Postal Code

Phone Number (Primary)

Date of Birth (yyyy/mm/dd)

Social Insurance Number

Email address

Canadian Citizen

Spouse Information Section

Full Legal Name

Address

City

Province/Terr.

Postal Code

Phone Number (Primary)

Date of Birth (yyyy/mm/dd)

Social Insurance Number

Email address

Canadian Citizen

MARTIAL STATUS on December 31, 2024 Select...

If changed in the year, please provide date:

Spouse or Common-Law Partner net income if tax return is not prepared by H&A Accounting:

Dependent Information

Name (first,last)	Date of Birth	SIN #	T4/T4A	Tuition	Daycare	Other
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐

Are any dependents eligible for the disability tax credit? (approved by CRA), if yes enter name:

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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 pay rent this yerar?

If yes, complete the following:

Landlord Full Name: **Total Rent Amount:**

Are you a first time home buyer?

If yes, complete the following:

Full Address: **Purchase Price:**

Did you sell your principal residence?

If selected yes, complete the following:

Property Full Address:

Date of Sale (dd/mm/yyy) **Sale Price:**

Was it your principal residence the entire time? (e.g. used as rental):

Was the property jointly owned with spouse/other? **If yes, split %:**

Do you own any foreign property ?

Did you sell a property that is *not* your principal residence?

If delected yes, please complete the *Capital Gains Document* that will be sent to you

Do you have rental income?

If selected yes, is it commercial or residential?

Please complete the Rental Information Document sent to you.

How did you hear about us? Select...

If selected Referral or Other please specify:

Thank you for taking the time to complete the intake form. Please provide all tax documentation to office@hnataxes.com.

Prior Year Tax Information

- ☐ Tax return(s) from last year filed
- ☐ Last year's Notice of Assessment

Income

- ☐ T4 slips
- ☐ T4A (pension/self-employment/commissions)
- ☐ T4E (employment insurance)
- ☐ T5007 (social assistance)
- ☐ T4AP (Canada pension plan benefits)
- ☐ T4A (OAS) old age security
- ☐ T4A(RCA) retirement compensation arrangement
- ☐ T4PS (statement of employee profit-sharing plan)
- ☐ T4RSP (registered retirement savings plan)
- ☐ T4 RIF (registered retirement income fund)
- ☐ T3 (income from trust allocations)
- ☐ T5 (investment income)
- ☐ T5013(A) (partnership income)
- ☐ T5008 (income from security transactions)
- ☐ Sale of stocks/bonds (attach gains/loss statement)
- ☐ Support payments received (attach support agreement)
- ☐ Foreign pension
- ☐ Self-employment (attach list of revenue/expenses)
- ☐ Rental income (attach list of revenue/expenses)

Deductions/Credits (attach receipts)

- ☐ RRSP contributions (include first 60 days of current year receipts)
- ☐ First Home Savings Account contributions
- ☐ Childcare expenses for each child
- ☐ Child fitness and arts receipts
- ☐ Medical expenses
- ☐ Charitable donations and political contributions
- ☐ Union and professional dues
- ☐ Support payments made–attach support agreement
- ☐ Disability tax credit approved by CRA
- ☐ Multigenerational Home Renovation
- ☐ T2202 (Tuition/education amounts) - signed if transferring
- ☐ Student loan interest statement
- ☐ Employment expenses – signed T2200 attached
- ☐ Interest paid to earn investment income
- ☐ Teacher's school supplies receipts
- ☐ New home buyers' amount – attach purchase agreement
- ☐ Volunteer firefighter/search & rescue - attach statement
- ☐ Accounting fees (investment income)
- ☐ Moving expenses
- ☐ Northern Resident Deduction

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Engagement Letter for 2024 Personal Income Tax Preparation

We would like to express our appreciation for the opportunity to work with you and provide advice on your income tax matters. As tax return preparers, we are obligated to follow due diligence when reporting on income tax returns. Failure to adhere to these standards may result in penalties for both taxpayers and tax preparers, as imposed by government agencies.

To ensure clarity and mutual understanding of our respective responsibilities, we ask all clients for whom we prepare tax returns to confirm the following arrangements:

Tax Return Preparation
We will prepare your 2024 personal income tax returns based on the information you provide to us. Please note that we will not audit or independently verify the data submitted, although we may request clarification on certain items if needed. It is our responsibility to prepare your tax returns accurately in accordance with the law and based on the information you have provided.

Client Responsibilities
You are responsible for providing us with all the necessary information to prepare complete and accurate returns. It is important that you retain all documents, cancelled cheques, and other records that substantiate your income and deductions, as these may be required to support the accuracy and completeness of your returns in the event of a review by the Canada Revenue Agency (CRA). As the taxpayer, you bear the final responsibility for the income tax return. Therefore, we strongly advise you to carefully review the tax return before signing.

Accurate and Complete Information
By signing this letter, you confirm that you will provide us with accurate and complete information necessary for the preparation of your tax return(s). This includes disclosing all foreign property interests with an aggregate cost exceeding $100,000 at any time during the year, as well as all income from foreign properties, regardless of their aggregate value, and any income or transactions related to non-resident trusts.

Penalties for Understatement of Tax Liability
The law imposes various penalties for taxpayers who understate their tax liability. Should you require additional information on the potential amount or circumstances of such penalties, please feel free to contact us.

CRA Review and Audit
The CRA may select your return for review and request supporting documents, which may include a full audit. Any proposed adjustments by the CRA are subject to certain appeal rights. In the event of a tax examination, we are available to provide representation on your behalf upon request.

Fees for Services
Our fee for services will be based on our fee schedule, along with any out-of-pocket expenses incurred. All invoices are due and payable upon presentation.

If the above accurately reflects your understanding and agreement, kindly acknowledge by signing and returning the enclosed copy of this letter. Should you have any questions or concerns, please do not hesitate to contact us at 519-919-8237 or via email at office@hnataxes.com.

Thank you for entrusting us with your tax preparation needs. We look forward to working with you.

Print Full Name	**Signature**	**Date**