* **New Client: Yes [ ] Returning Client [ ] Tax Information Tax Year \_2020 or \_\_\_\_\_\_**

**Referred by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(If applicable) Canadian Citizen Y/N**

**- Do you have Property (Outside Canada) Valued at over $100,000 Y/N**

**- Did you sell a property in the tax year? Y/N**

First Name Last Name Date of Birth (Spell Month)

**SIN \_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_ Did this Taxpayer Receive CERB or CRB in 2020 [ ] Yes [ ] No**

Address 1 Apt/Unit City Province

Address 2 Postal Code

Email: Phone Number: ( )

**For this tax payer how many**

T4 slips [ ] T4A slips [ ] T5 slips [ ] T3 slips [ ] RRSP Receipts [ ] T5008 [ ] T4(P) [ ] T4(OAS) [ ]

are attached

Please include your last Notice of Assessment [ ] (New Clients Only)

Notes: Please list any other forms

Province on December 31 - Same as address [ ] or

Married [ ] Common law [ ] Widowed [ ] Divorced [ ] Separated [ ] Single [ ] on Dec 31

If your status changed in the tax year give date and prior status:

Month Day Last years status

**Spouse’s** First Name Last Name Date of Birth (Spell Month)

SIN

Address is the Same as above [ ] or **Did this Taxpayer Receive CERB or CRB in 2020 [ ] Yes [ ] No**

**For this tax payer how may**

T4 slips [ ] T4A slips [ ] T5 slips [ ] T3 slips [ ] RRSP Receipts [ ] T5008 [ ] are attached

Notes: Please list any other forms

**Dependant Information:**

First Name Last Name Date of Birth Relationship Income SIN T4 Disability

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**Child Care:**

Child Name Paid to Amount SIN if Individual # of weeks if camp

**PROVINCIAL TAX CREDITS:**

List address with postal code (if you lived at one then one address in tax year): (# of months at each location)

Amount paid (indicate Rent or Tax) Whom it was paid: if tax property Roll # from Property tax bill:

If you have rental income please let me know and I will forward you an additional information form.

Any other information related to Income Tax: (if you’re not sure please ask!)

**Court Ordered Support (Child/Spousal):**

Total Amount Non-Deductible Amount Deductible Amount

Paid To / Or Received From SIN

**STUDENTS:** T2202A or TL11, if you are not sure ASK please!

**Business Information:**

**Use separate sheet for each business (Not Corporation)**

Business Name:

If First Year Date Started:

Address: Same as above [ ] or

Do you have an HST/GST number? Y [ ] N [ ]

If Yes: List HST/GST Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Province of operation:**

[ ] same as home address or \_\_\_\_\_\_

Main Activity/Product:

Web site address(s)

**Page 2 of 5**

Direct Marketing [ ] name of Brand:

Partners in the Business:

First year Filing for this business [ ] Yes

[ ] No (Please provide the T2125 for last year)

Last year in business [ ] yes [ ] no

Is this your only business [ ] Yes [ ] No

If yes please provide a separate sheet for each business

Sales or commissions included on T4A [ ]

Sales including GST/HST $

HST/GST included above $

**Inventory at end of last year (For Resale)$**

Purchased Inventory (For Resale) $

Auto Ship (If Product) $

Labour/Contractors $

Shipping $

**Inventory at Year End (For Resale)$**

Advertising and Promotional $

(Include Business Cards, printed materials,

gift cards, gifts, trade shows etc.)

Meals and entertainment $

Bad Debts $

Insurance for Business $

Interest and Bank fees $

Business Tax, fees, Licences, dues, **renewals**, **IA,**

memberships and subscriptions $

Office expenses (paper, printer, ink, desk, pens

File folders etc.) $

Supplies for the business $

Legal, accounting and

other professional fees $

Management fees $

Salaries, wages, and benefits

(including employers expense) $

Property tax (Business Property) $

Travel Expenses for Business

(include; Transportation fees/tickets,

accommodations, Travel Meals ONLY, miscellaneous fees, Baggage Fees)

If you are not sure Ask me

Telephone, Cell phone, internet $

Business location Utilities $

Delivery, freight costs $

Other:

Please list:

**Do you use a portion of your home or apartment**

**for business? Y N**

If Yes:

How many rooms or square feet is your home

**How much of that space is dedicated to business**

Totals (100%) for the year

Hydro $

Heating $

Insurance $

Maintenance & Repairs $

Renovations & Additions$

Mortgage Interest $

Property Tax $

Rent Paid $

Parking $

Water $

Condo Fees $

Other (Please List)

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**Do you use your car for business? Y N**

If Yes:

How many TOTAL Km driven in the year \_\_\_\_\_\_\_\_\_\_\_

How many Km were for business Very important \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Vehicle Information:**

**Make**:

Model:

Year:

**Vehicle Information Continued…**

Totals (100%) for the year

Fuel $

Maintenance & Repairs $

Auto Insurance $

Registration $

Parking $

[ ] Leased:

Date leased

Lease end date

Total payments for the year $

Manufacture List Price (MSRP) $

[ ] Owned:

Purchase Date

Purchase Price $

[ ] Is the vehicle financed

Loan start Date

Loan End Date

Interest Paid in the year $

**Business Assets**

Any major business item costing $500 or more

Including any computer, Lap top and/or tablet etc.

**List items with**: Description

Amount Paid

Date acquired

This may include assets you bring into the business

Please note that all 5 pages of this form are required to be completed, signed and returned to form part of your file. For new clients we will forward you a T1013 form required before we can begin. Once completed we will forward you a draft copy of your return and a T183 form to sign and return, once you have reviewed your tax return. Once we receive the T183 signed and payment in full we will then file your tax return electronically with CRA.

If you have any concerns or questions during the year following completion of your tax return please feel free to contact our office for assistance.

**Anything else you can think of please list it**

**and we can discuss it.**

Additional Notes:

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***Taxpayer Responsibilities***

1. You MUST retain all receipts and documentation for CRA review if necessary.
2. All documentation must be included in one email, including all 4 pages of this document signed, to Watterson Financial Solutions Inc. (WFSI). In order for your return to be completed accurately.
3. The CRA Form Number T1013 (If not on file for a prior year) must be signed and returned to WFSI before the Income Tax and Benefit Return (T1G) can be submitted to CRA on your behalf.
4. The CRA Form Number T183 for each year being filed must be signed at Part D and Part E then returned to WFSI before the Income Tax and Benefit Return (T1G) can be submitted to CRA on your behalf.
5. Full payment must be received by our office before anything can be submitted to CRA in any form on your behalf. Past due accounts will be subject a late fee of $55 plus HST at 31 days past due plus 18% annual service charge.

**All information provided is full and complete to the best of my knowledge.**

**If I am claiming business expenses Iunderstand and hereby certify that I am active in my business and working towards a profit and long- term financial gain.**

**Sign…………………………………Date**

**Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Spouse:**

**Sign…………………………………Date**

**Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Terms of service:**

*Price quotations subject to adjustment after all information has been received, changes in information may require additional charges. All applicable taxes are extra. Price includes assistance and advice for following year. Past due accounts will be subject 18% annual service charge*. All cheques returned from bank for any reason will be subject to a $55 plus HST admin fee. If an arranged payment is missed the same admin fee applies.

*All forms will be forwarded for you approval and will be filed with CRA by eFile upon receipt of signed T183, T1013 as well as full payment.*

*For ETransfer please follow the instructions on your Invoice, payment is not received until confirmed deposited.*

**Watterson Financial Solutions Inc.**

**Service Guarantee**

*Provided you have signed and returned the form T183 (with Watterson Financial Solutions Inc.) for the year in question, as well, Watterson Financial Solutions Inc. has a valid T1013 (or RC59 for Corporations) on file, for the taxpayer and for the year in question. We will assist you in correcting any and/or all errors made, or disagreement caused, By You, Us or CRA, without additional cost to you, (other than expenses). We do not assist if you have intentionally misled, Watterson Financial Solutions Inc., failed to pay your account with Watterson Financial Solutions Inc., or failed to inform Watterson Financial Solutions Inc. of ANY notice you receive from CRA upon receipt.  If you wish at any time to retain counsel, at your own expense, that is your option, and we will assist your legal team anyway we can.*

E&OE

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