



We appreciate your help in completing this form prior to bringing in your tax information!

**DATE** \_\_\_\_\_ Mailed In  Couriered In  Dropped Off   
 For office use only.

**1. CLIENT NAME** (Last) \_\_\_\_\_ (First) \_\_\_\_\_ SIN \_\_\_\_\_

Tel # (Home)  \_\_\_\_\_ DOB *yyyy* \_\_\_\_\_ / *mm* \_\_\_\_\_ / *dd* \_\_\_\_\_

(Work)  \_\_\_\_\_ Canadian Citizen **Y**  or \_\_\_\_\_

(Cell)  \_\_\_\_\_  
 Please select principle contact number  
 May Canada Revenue Agency provide your name, address and SIN to Elections Canada to keep the voters list up to date? **Y**  or **N**

(Email) \_\_\_\_\_ (Fax) \_\_\_\_\_

**2. SPOUSE NAME** (Last) \_\_\_\_\_ (First) \_\_\_\_\_ SIN \_\_\_\_\_

Tel # (Home)  \_\_\_\_\_ DOB *yyyy* \_\_\_\_\_ / *mm* \_\_\_\_\_ / *dd* \_\_\_\_\_

(Work)  \_\_\_\_\_ Canadian Citizen **Y**  or \_\_\_\_\_

(Cell)  \_\_\_\_\_  
 Please select principle contact number  
 May Canada Revenue Agency provide your name, address and SIN to Elections Canada to keep the voters list up to date? **Y**  or **N**

(Email) \_\_\_\_\_ (Fax) \_\_\_\_\_

**ADDRESS** Apt # \_\_\_\_\_ Street \_\_\_\_\_  
 \_\_\_\_\_  
 City \_\_\_\_\_ Prov \_\_\_\_\_  
 Postal Code \_\_\_\_\_

**TAX RETURN ... Will Pick Up**  **OR**  
**Mail to - Address Shown**  **Other**

**RETURN TAX RECEIPTS TO CLIENT** **Y**  or **N**

**MARITAL STATUS** Married  Common Law  Divorced  Separated  Widowed  Single   
 Date of status change in 2009 *mm* \_\_\_\_\_ / *dd* \_\_\_\_\_

**DEPENDENTS** (If more space is needed, please use reverse side of form)

1. \_\_\_\_\_ /\_\_\_\_\_/\_\_\_\_\_ (\_\_\_\_) SIN \_\_\_\_\_  
 Name DOB (yyyy/mm/dd) M/F
  
2. \_\_\_\_\_ /\_\_\_\_\_/\_\_\_\_\_ (\_\_\_\_) SIN \_\_\_\_\_  
 Name DOB (yyyy/mm/dd) M/F
  
3. \_\_\_\_\_ /\_\_\_\_\_/\_\_\_\_\_ (\_\_\_\_) SIN \_\_\_\_\_  
 Name DOB (yyyy/mm/dd) M/F

NEW HOME BUYER? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/>	HRTC? Personal <input type="checkbox"/> Strata <input type="checkbox"/>
RRSP HOME BUYER'S PROGRAM? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/>	RRSP LIFELONG LEARNING PLAN? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/>
ELECTED SPLIT-PENSION INCOME? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/> (If yes, please indicate split percentage: _____ %)	FILE GST RETURN? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/>
US TAX RETURN TO BE FILED? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/>	ANY FAMILY MEMBER(S) DISABLED? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/>
IF RECEIVED PREVIOUS YEAR'S NOTICE OF ASSESSMENT, COPY PROVIDED? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/>	DO YOU HAVE FIRST NATION STATUS WITHIN THE MEANING OF <i>THE INDIAN ACT</i> ? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/>
FOREIGN PROPERTY – did you own/hold foreign property at any time in 2009 with a combined cost of more than \$100,000 Cdn? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/> (If yes, please note the type of property, cost and country location: _____)	DIRECT DEPOSIT? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/> Already Set Up <input type="checkbox"/> New <input type="checkbox"/> Branch # _____ Institution # _____ Account # _____

**Agreement with REID HURST NAGY INC., Certified General Accountants**

We will prepare your personal income tax return(s) (including family members and all previous and future tax years) based on information that you provide to us and electronically file your return(s) if allowable. We will not audit, review 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 return correctly according to the law and the information that you have provided. It is your responsibility to provide us with all the information required to prepare complete and accurate returns. We will keep slips that you submit to us. You should retain all the documents, cancelled cheques and other data that form the basis of your income and deductions. 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 and, therefore, you should review it carefully before you sign it.

You confirm that you have informed us of all interests you held in foreign properties with a combined cost in excess of \$100,000 Cdn. At any time in 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.

REID HURST NAGY INC. respects the privacy of personal information, that is, information that identified you as an individual or that is associated with such identifying information. You agree to provide personal information necessary for us to meet your service requests. You also agree that you have obtained consent from others for whom you have provided us with personal information for collecting, using and disclosing this information, according to privacy legislation. We follow rigorous privacy practices and we have a privacy policy that governs our use and handling of the information you provide to us. For more information, please visit our website [www.rhncga.com](http://www.rhncga.com) or contact our privacy officer at 604-273-9338 or by email at [privacy@rhncga.com](mailto:privacy@rhncga.com).

If so indicated, you authorize CRA to forward your name(s), address(es) and date(s) of birth to Elections Canada to update information on the NATIONAL REGISTER OF ELECTORS.

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

Accepted by: \_\_\_\_\_

Date: \_\_\_\_\_

(Please sign here)