

Happy 2023 Tax Season!

Please refer to the below for reference on the tax kit forms. Please note our new mailing address to forward your tax information is **PO Box 5016, 103-215 Sanders Street, Kemptville ON K0G 1J0.**

1. Please complete the following documents

- ☐ 2023 T1-Engagement Agreement
- ☐ 2023 Personal Tax Checklist
- ☐ 2023 Medical Expense Spreadsheet (if necessary)

2. Please ensure that you send all the required supporting information, including but not limited to:

- ☐ Income slips/information from all sources (T4, T5, Income Statement, etc.)
- ☐ Medical Expenses included in a summary format or using the spreadsheet provided
- ☐ Childcare expenses, Donations, RRSP contributions
- ☐ Any other supporting documents for income/expenses to be claimed on your tax return

3. Please include the supporting information for the following, if applicable:

- ☐ Employment Expenses - T2200 Declaration of Conditions of Employment
- ☐ Rental Income - T776 Statement of Rental Activities in Canada
- ☐ Self-employed Income - T2125 Statement of Business Activities
- ☐ Investment Income - T5008 Statement of Securities Transactions

Additional tax return schedules including but not limited to the above will have additional preparation fees based on complexity

Our goal is to ensure your taxes are prepared accurately. Misreporting income and expenses on your taxes can be costly. If you're not sure about what to claim, contact our team for assistance at 1-866-448-2188.

If you require additional copies of any documents, please visit us at www.taxwise.ca/forms.

We look forward to preparing your tax return(s).

Best Regards,

TaxWise Inc.
www.taxwise.ca
1-866-448-2188



2023 T-1 Engagement Agreement

The responsibility of the Taxpayer is as follows:

To provide TaxWise Inc. with complete and accurate information necessary for your tax filing as required under the Income Tax Act; Include all relevant slips and receipts; Report all sources of income.

The responsibility of TaxWise Inc. in the preparation of 2023 T-1 Income Tax Returns is as follows:

TaxWise Inc. will not audit, review, or verify the accuracy or completeness of the information provided by the taxpayer. TaxWise Inc. is limited to preparing the return(s) based on the information provided by the taxpayer, and does not assume responsibility for missing information if it has not been provided at the time of filing.

I agree to the above terms and requirements.

Tax payer #1 Print Name

Sign

Date (MM/DD/YYYY)

Tax payer #2 Print Name

Sign

Date (MM/DD/YYYY)

Tax payer #3 Print Name

Sign

Date (MM/DD/YYYY)

Tax payer #4 Print Name

Sign

Date (MM/DD/YYYY)

Fees* & Payment Options:

Please check appropriate boxes (All fees quoted include applicable taxes)

- ☐ 1 Personal T1 Income Tax and Benefit Return \$175 total
- ☐ 2 Personal T1 Income Tax and Benefit Returns \$300 total
- ☐ 3 Personal T1 Income Tax and Benefit Returns \$400 total
- ☐ 4 or more, please add \$100 for each additional tax return (Example: 4 returns = \$500.00)

- ☐ I have enclosed a cheque placing my Client Number on the "Memo" Line
- ☐ I have paid using online banking, using TaxWise or TaxWise Inc. as payee and Client ID for Account
- ☐ I have paid via E-transfer, using the email payments@taxwise.ca (no security question required)
- ☐ I prefer to pay by phone (call 1 866 448 2188)
- ☐ I prefer to pay by credit card (Mastercard or Visa)

Name (as it appears on card) _____

Card #: _____

Expiry: ____ / ____ Card Security Number: _____

* Returns including (but not limited to) matters involving foreign earnings, T2200/T777 forms, T776 forms, or T5008 forms, prices may be subject to change depending on the scope of work. Additional costs will be charged for any pre-assessment or post-assessment reviews requested by the Canada Revenue Agency.

TaxWise reserves the right to refuse service upon its own discretion.

| Information | Individual 1 | Individual 2 |
|--------------------------------------|--------------|--------------|
| Last Name, First Name | | |
| Date of Birth (MM/DD/YYYY) | | |
| Email Address | | |
| Phone Number | | |
| Street Address | | |
| City, Province | | |
| Postal Code | | |
| Marital Status | | |
| **if changed in 2023, date of change | | |
| Dependent(s) (under 18 or 65+) | | |
| Last Name, First Name | | |
| Date of birth (MM/DD/YYYY) | | |
| **address if different from above | | |
| Last Name, First Name | | |
| Date of birth (MM/DD/YYYY) | | |
| **address if different from above | | |

**Information Checklist, indicate if applicable and include any necessary supporting information.

| Information to Include | Individual 1 | Individual 2 |
|---|--------------|--------------|
| Spousal Support payments | | |
| Child Support Payments | | |
| Child Care Expenses | | |
| Medical Expenses | | |
| Medical Travel (over 40km) | | |
| Tuition Fees | | |
| Student Loan Interest | | |
| RRSP/FHSA Contributions | | |
| Home Renovation Costs | | |
| **accessibility or multigenerational home | | |
| Rent Paid in ON | | |
| Property Tax Paid in ON | | |
| Charitable Donations | | |
| Political Donations | | |
| Employment Expenses | | |
| Moving Expenses (school or job) | | |
| Home Buyer's Plan | | |
| First Time Home Buyer in 2023 | | |
| Sale of Principal Residence (exemption) | | |
| Sale of Residence (taxable) | | |
| Volunteer Firefighter | | |
| Volunteer Search and Rescue | | |
| Bankruptcy in 2023 | | |
| Foreign Property Holdings | | |
| Provide Information to Elections Canada | | |
| Canadian Citizen | | |

| Information | Individual 3 | Individual 4 |
|--------------------------------------|--------------|--------------|
| Last Name, First Name | | |
| Date of Birth (MM/DD/YYYY) | | |
| Email Address | | |
| Phone Number | | |
| Street Address | | |
| City, Province | | |
| Postal Code | | |
| Marital Status | | |
| **if changed in 2023, date of change | | |
| Dependent(s) (under 18 or 65+) | | |
| Last Name, First Name | | |
| Date of birth (MM/DD/YYYY) | | |
| **address if different from above | | |
| Last Name, First Name | | |
| Date of birth (MM/DD/YYYY) | | |
| **address if different from above | | |

**Information Checklist, indicate if applicable and include any necessary supporting information.

| Information to Include | Individual 3 | Individual 4 |
|---|--------------|--------------|
| Spousal Support payments | | |
| Child Support Payments | | |
| Child Care Expenses | | |
| Medical Expenses | | |
| Medical Travel (over 40km) | | |
| Tuition Fees | | |
| Student Loan Interest | | |
| RRSP/FHSA Contributions | | |
| Home Renovation Costs | | |
| **accessibility or multigenerational home | | |
| Rent Paid in ON | | |
| Property Tax Paid in ON | | |
| Charitable Donations | | |
| Political Donations | | |
| Employment Expenses | | |
| Moving Expenses (school or job) | | |
| Home Buyer's Plan | | |
| First Time Home Buyer in 2023 | | |
| Sale of Principal Residence (exemption) | | |
| Sale of Residence (taxable) | | |
| Volunteer Firefighter | | |
| Volunteer Search and Rescue | | |
| Bankruptcy in 2023 | | |
| Foreign Property Holdings | | |
| Provide Information to Elections Canada | | |
| Canadian Citizen | | |



2023 Medical Expense Form

[illegible]



2023 Medical Travel Form

[illegible]