

Client Name: _____ Date: _____ Phone Number: _____

Personal Return Business Rental Farm

Office use only

Client number: _____

Preparer: _____ Reviewer: _____

New client Yes No

Reference: _____

Please Indicate the following:

Section #1

Address: _____

S.I.N.: _____ D.O.B.: _____ Gender: _____

Alternative Phone Number: _____ E-mail: _____

Spouse name (If separated, name of ex-spouse): _____

If we don't file your partner's taxes, please provide this info on their behalf:

Line 23600 Federal: _____

S.I.N.: _____ D.O.B.: _____

Marital status on December 31, 2025: Married Living common-law Single
 Widowed Separated Divorced

Did your civil status change in 2025? Yes Date of change: _____ No

Is this a tax return for a deceased individual? Yes Year of death: _____ No

What was your province or territory of residence on December 31, 2025: _____

Do you have **Canadian Citizenship**? Yes No

Have you paid **tax installments**?

If yes, how much? _____

As a Canadian citizen, do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Election Canada to update the National Register of Electors or, if you are 14 to 17 years of age, the Register of Future Electors?

Yes No

Do you authorize the CRA to provide your name and e-mail address to Ontario Health (Trillium Gift of Life) so Ontario Health (TGLN) may send information to you by email about organ and tissue donation?

Yes No

Section #2

Dependent's Information (If new client or new information):

Child's name	Date of birth	Gender	S.I.N.	Post-secondary student	Shared custody

Section #3

- Do you have any **Donation Receipts**? Yes No
- Do you have any medical receipts? Yes No
- Do you have **employment expenses**? (T2200 for home office, car expenses, etc.) Yes No
- Do you or a family member have a **severe impairment** or a **disability**? Yes No
- If yes, do you have T2201? Yes No

Section #4

Home

- Did you pay property tax? Yes No
- If yes, how much? _____
- Did you pay rent? Yes No
- If yes, how much? _____

Disposition or deemed disposition of a real property in 2025

A real property includes a house, a land, a condo, a cottage, a mobile home, etc.

- Did you sell, transfer, or give away any real property in 2025 to a stranger or a family member? Yes No
- If yes, did the use of the property change at anytime throughout the ownership? Yes No

Business

For self-employed individuals:

Do you have a **GST return** to file? Yes No

If yes, do you want us to do it? (Additional Fee) Yes No

Do you have one or more **rental properties**? Yes No

Investments

Did you contribute to any RRSP in 2025 or in the first 60 days of 2026? Yes No

Did you own or hold specified foreign property where the total cost amount is more than CA\$100,000? Yes No

Have you received or transferred (sold, disposed, exchanged, given, etc.) virtual money (ex: Bitcoin)? Yes No

Did you contribute to a FHSA (First Home Savings Account) in 2025? Yes No

Did you withdraw RRSP in 2025? Yes No

Student

Did you pay tuition/education amount? Yes No

Did you pay tuition/education amount for someone else, or did someone else pay for your tuition/education amount?

If yes, do you want to: transfer it to you keep it on the T1 of the other person?

Service Agreement

By completing and signing this Service Agreement, the Client agrees that:

- The basic fare for filing a 2025 tax return is **\$165** per person plus tax.
- They provide VS Group with all slips/papers required;
- The Service Agreement isn't limited to the services listed above. If additional forms/schedules need to be completed in order to prepare the tax return they are automatically included in this service agreement at the current rate;
- VS Group will prepare the return based on all slips/ papers provided;
- VS Group will EFILE the return and provide the Client with a printed return upon receiving payment;
- Additional bookkeeping charges will apply if the records supplied are incomplete or not summarized. Additional bookkeeping is billed at a rate of \$97.00/hour, or as quoted;
- Additional fees may apply for the preparation and filing of other schedules/forms not included with the T1;
- The 72-hour Income Tax Return Preparation Policy is calculated from the time all required information is received at our office and only applies to basic T1 returns. VS Group cannot guarantee completion of the return within this timeline;
- The 5 Business Day Policy applies to all personal returns that have additional income (business, rental, professional, or farm);
- Personal returns dropped off 5 business days prior to the deadline are not guaranteed to be complete before April 30th, 2026;
- Business returns dropped off 5 business days prior to the deadline are not guaranteed to be complete before June 15th, 2026;
- VS Group is not liable or responsible for any late filing fees that may occur to the client;
- Should an audit on the return occur VS Group cannot be held responsible for any CRA assessments or re-assessments. VS Group can however provide the client with audit services at an additional cost, this cost varies depending on the amount of work required.

TERMS OF PAYMENT: Payment is an obligation upon the signing of this Service Agreement and becomes due when the work outlined herein is complete. Note that the tax return will not be EFILED until payment of all services is received. Also, note that dissatisfaction with tax return outcome does not void the Terms of Payment obligation.

IN WITNESS THEREOF, and intending to be legally bound thereby, the parties hereto have duly executed and delivered this Service Agreement as of the date and year above written.

Client's Signature: _____ Date: _____