



# How To Get Started Now

Phone: 1-866-485-2683  
Fax: 1-866-485-2761  
Email: [taxes@ptccanada.com](mailto:taxes@ptccanada.com)

The purpose of this form is to give PTC Canada an idea how we can best help you solve your tax situation, and to let you, the client, know what forms you may need to fill in so work may commence.

**Instructions:** Fill in the Contact & Tax information as best you can, *the more information you can give us the better* then return this form by email and we will get back to you ASAP.

## Contact Information

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_ Email: \_\_\_\_\_  
City: \_\_\_\_\_ Prov: \_\_\_\_\_ PC: \_\_\_\_\_

## Tax Information

What tax years are involved: \_\_\_\_\_

In a paragraph, please give us a general synopsis of your situation:

Are investments, self-employment, employment expenses, or rental income relevant to your taxes?  Yes  No

Who besides yourself is involved in what needs to be addressed? Please include spouse, dependant, partners, etc., if relevant

What are your expectations of us and what would you like this situation to look like upon completion?

**If you would like to get a head start getting together the information we will require, we have created a list of booklets and forms grouped according to tax categories.**

1. Click the links, and SAVE the booklets & forms from the "**ALL TAXES**" plus the **Section(s)** that best describes your situation to your computer.
2. Complete the forms then return by e-mail (*some forms have e-mail button*) or by snail mail.

## All Taxes

## Business Taxes

## Employment Taxes

## Investment Taxes

## Rental Property Taxes

## Other Common Claims