



Tax Summary

The purpose of this tax summary 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 you can expect once work has commenced.

Instructions: Fill in the information as best you can, following the sample on page 2. If some of the information is missing or you are uncertain about it, please indicate in detail when or how you plan to obtain it. Mark which of the following you are sending with this sheet:

1. Personal Consent Form _____ and/or Business Consent Form _____
2. Completed Personal Tax Checklist _____
3. Other worksheets or completed forms _____
4. CRA correspondence _____
5. Agreed deposits _____

When you have arranged shipping, please contact us with tracking number or shipping method and date when we can expect your package. You can also fax, e-mail, and in some cases arrange personal pick-up.

Overview

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

What tax years are involved?

Are investments, self-employment, employment expenses, or rental income relevant to your taxes? If yes, please download our booklets from our website and fill out the relevant parts.

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?

Sample for you to follow

1. Personal Consent Form Yes and/or Business Consent Form Yes
2. Completed Personal Tax Checklist Yes
3. Other worksheets or completed forms Yes, small business
4. CRA correspondence Yes, all notices to file income tax return letters
5. Agreed deposits Yes, \$500 via bank draft

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

I need 5 years of personal and business income taxes completed because I have received several letters from CRA and a deadline to have this completed. This is because I have been in and out of work and unsure of how the tax liability will work out for me. Therefore, I have simply put it off. I am missing some receipts for 2002 and need advice on this, but have everything else.

What tax years are involved? *1999 to 2003*

Are investments, self-employment, employment expenses, or rental income relevant to your taxes? If yes, please download our booklets from our website and fill out the relevant parts.

Yes. I have downloaded and filled out the Small Business Tax worksheets.

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

We have 2 kids, and my wife is an active partner in the business and will file accordingly.

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

I would like PTC Canada to handle everything and represent me to CRA. I need everything completed, done up to date, and my account settled. I also need an on-going consultant to help me in the future to prevent this from happening again.