



Information Return for Electronic Filing of an Individual's Income Tax and Benefit Return

Tax year: 2023

The information on this form relates to the tax year shown in the top right corner. Before you fill out this form, read the information and instructions on **page 2**. The individual identified in Part **A** (or the individual's legal representative) must sign Part **F**. Your electronic filer must fill out Part **C** and Part **D** before submitting your return. Give the signed original of this form to your electronic filer and keep a copy for yourself.

Part A – Identification and address as shown on your tax return (mandatory)

First name	Last name	Social insurance number	
Mailing address: Apt number – Street number – Street name	PO Box	RR	City
		Prov./Terr	Postal code

Get your CRA mail electronically delivered in My Account (optional)

Email address: _____

By giving an email address, I am registering to receive email notifications from the CRA and agreeing to the terms of use on **page 2**.

Part B – Declaration of amounts from your Income Tax and Benefit Return (mandatory)

Enter the following amounts from your return, if applicable:

Total income (line 15000)	Refund (line 48400)
Taxable income (line 26000)	or
Total federal non-refundable tax credits (line 35000)	Balance owing (line 48500)

Part C – Electronic filer identification (mandatory)

By signing Part **F** below, I declare that the following person or firm is electronically filing the new or the amended Income Tax and Benefit Return of the person named in Part **A**. Part **F** must be signed before the return is electronically transmitted.

Name of person or firm: _____ Electronic filer number: _____

Representative identifier (Rep ID): _____

Part D – Document Control number (mandatory)

The document control number generated for my electronic record: _____

Part E – How do you want to receive your notices of assessment and reassessment? (select one or more of the following electronic options)

☐ I am registering (as indicated in Part **A** above) or I am already registered to receive electronic mail from the CRA and can view and access my notices of assessment and reassessment online.

☐ I would like my electronic filer to receive a one time notice of assessment and reassessment electronically in their software and provide me with a copy.

I understand that by ticking (✓) this box, I am allowing the CRA to electronically provide my assessment results and my notices of assessment and reassessment to the electronic filer (including a discounter) named in Part **C**. I will now receive a copy of my notices of assessment and reassessment from my electronic filer. For more information, see the Express NOA section on **page 2**.

OR

☐ I would like to receive paper notices of assessment and reassessment through Canada Post.

I will receive my notices of assessment and reassessment through Canada Post once my return or amended return has been assessed. If I have already registered to receive electronic mail from the CRA and I tick this box, I understand that I will **not** receive a copy of my notice through Canada Post.

Part F – Declaration and authorization (mandatory)

I declare that the information entered in parts **A**, **B** and **C** is correct and complete and fully discloses my income from all sources. I also declare that I have read the information on **page 2**, and that the electronic filer identified in Part **C** is filing my return. I allow this electronic filer to communicate with the CRA to correct any errors or omissions.

X _____

Signature (individual identified in Part **A** or legal representative)

Name and title of legal representative

Year Month Day HH MM SS

□ □ □ □ □ □



Chris Bell, CPA, CA*
Karla Kimble, CPA, CA*
Jesse Lofstrom, CPA, CA*
Neil Rozema, CPA, CMA, CA*
Lindsey Wickberg, MPAcc, CPA, CA*

Dear Client,

This letter outlines the basis of understanding between yourself and Fulcrum Group Chartered Professional Accountants (the Firm) and our involvement in the preparation and filing of your personal tax return. It is your responsibility, under the Income Tax Act, to provide us with complete and accurate information. This applies to the written or printed records you provide, as well as any explanations given. Any business, professional, farming, rental or commission schedules included in your return are prepared on a “Tax Purposes Only” basis and are solely for your own personal use. These are not reports that are intended for third parties (your bank, for instance).

The Firm will treat all information obtained from you while performing our services as confidential and it will not be used except in connection with the performance of our services. This restriction will not apply to any confidential information that the Firm is required by law or professional standards to disclose. Under this engagement, you authorize the Firm personnel performing any income tax return preparation services to discuss or have available to them all information and materials that may affect the engagement.

Our fees are based upon an hourly rate for the time taken by the person preparing the return, as well as an administration fee that includes, any supplies required and the time taken to print, review, and efile the return. Either party, without notice, may terminate the arrangement.

Canada Revenue Agency selects tax returns to review or audit from time to time and yours could be selected. In the event there is a reassessment, there could be additional tax owing plus interest and perhaps penalties for any particular year. There will also be additional fees for any services we perform in assisting with their audit. If there is an error found for which we must assume responsibility, our liability for damage is limited to the penalties incurred for the incident; however, the tax and interest on the transaction would be your responsibility.

Canada Revenue Agency has a section in the Income Tax Act (Sec 163.2) for applying civil penalties to third parties for false statements or omissions that are made by the taxpayer. The minimum penalty is \$1,000 and you hereby agree to indemnify us should any penalty be imposed on us due to false statements or omissions.

If you have foreign investments totaling over \$100,000 (*excluding RRSP accounts*), you are required to file a T1135. Fulcrum Group will prepare this return based on the information you provide below.

By initialing below, you understand the risks and responsibilities associated with electronic communication and agree to receive communications, documents, and your personal tax returns via your personal email account.

Please Read carefully and INITIAL and/or SIGN in the appropriate areas

I _____ **OR** _____ have foreign investments over \$**100,000** (*excluding RRSP accounts*)
DO NOT (INITIAL ONE ONLY) DO

_____ I authorize Fulcrum Group Chartered Professional Accountants to send electronic communications
(Please initial)

I understand and accept all terms of this engagement

X

_____, 2024

Client Signature Today's Date Print Client Name

Yours truly,

Fulcrum Group

Fulcrum Group
Chartered Professional Accountants

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