Personal Tax Consultants Canada

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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 ◯ Yes ◯ No and/or Business Consent Form ◯ Yes ◯ No
2. Completed Personal Tax Checklist ◯ Yes ◯ No Comment
3. Other worksheets or completed forms ◯ Yes ◯ No Forms
4. CRA correspondence ◯ Yes ◯ No Comment
5. Agreed deposits ◯ Yes ◯ No Comment

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? ◯ Yes ◯ No
If yes, please download our booklets from our web site and fill out the relevant sections.

Comments

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

Comments

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

Comments

Sample for you to follow

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