

New Client Information Package

As a new client of Huron Business Services, we require some basic information regarding you, your business, and your required services. Please fill out this package in full and return it to HuronHRPayroll@gmail.com or by mail to PO Box 3, Brussels ON, N0G 1H0, attention: Huron Business Services.

Client/Contact Information:

| | | | |
|-----------------------------|--|-----------------------------|--|
| Full Name: | | Date of Birth: | |
| Street # & Name: | | Apt #, PO Box, etc.: | |
| City: | | Postal Code: | |
| Cellphone #: | | Personal Email: | |

Business Information (if applicable):

| | | | |
|---------------------------|--|------------------------|--|
| Company Name: | | CRA Business #: | |
| Company Address 1: | | CRA HST #: | |
| Company Address 2: | | CRA Payroll #: | |
| City: | | Phone #: | |
| Postal Code: | | Email: | |

Please select what service(s) you're interested in receiving. Please check all that apply.

- ☐ Annual Tax Return Services
- ☐ Tax Return (Personal or T1 Form)
 - ☐ Tax Return (Self-Employed / Sole Proprietorship – T1 Form)

Please note that tax return services require a verification of identity and collection of personal information related to your employment, income, and person such as your Social Insurance Number for submission to the Canada Revenue Agency.

- ☐ Bookkeeping Services (Accounts Payable / Receivable / G/L Maintenance)
- ☐ Annual (annual entries for small businesses under 100k in revenue/year)
 - ☐ Quarterly (100-200k revenue/year)
 - ☐ Monthly (200-350k revenue/year)
 - ☐ Biweekly (350-500k revenue/year)

- ☐ Bookkeeping Set-Up (New Company)
 - ☐ QuickBooks Desktop
 - ☐ QuickBooks Online
 - ☐ Sage50 Pro
 - ☐ Sage300 ERP

- ☐ Business Registration for a CRA Business #
 - ☐ Registration for HST Account Number (RT account)
 - ☐ Registration for a Payroll Account Number (RP account)
 - ☐ Registration for a Charitable Status Account Number (RC account)

- ☐ Business Registration (Provincial) Including Business Operating Name or Numbered Company

- ☐ Payroll Calculation, Processing, and/or Payment Services (Please check off for number of employees)
 - ☐ 0-10 Employees
 - ☐ 11-25 Employees
 - ☐ 26-50 Employees

- ☐ Payroll Remittances (CPP/EI/Taxes/EHT/WSIB) & Other Remittances (Benefits, RRSP, etc.)
 - ☐ Source Remittances (CPP/EI/Federal & Provincial Taxes/EHT/WSIB)
 - ☐ Benefits Payments / Reconciliation
 - ☐ RRSP or RPP Payments / Reconciliation

- ☐ Human Resources Consulting & Services
 - ☐ Recruitment (Local)
 - ☐ Recruitment (International)
 - ☐ Employee Relations
 - ☐ Union/Labour Relations
 - ☐ Employment Legislation

Tax Return Checklist - ONTARIO

Please ensure to provide all the following information regarding your tax return when returning this form. Please provide all forms as applicable. Please note this is not an exhaustive list. Please ensure to check your CRA account online after Feb 28 and March 31 of each year to see if new slips have been generated that may require updating your return.

Personal Information – to prevent fraudulent returns, and ensure accuracy in processing your return, we require a scan of a piece of government photo ID that includes your home address that will be on your return, such as a provincial driver's license or residence card. If you do not have this, a scan of a piece of photo ID such as a Passport or Provincial Health Card (Insurance Card) and a bill from a utilities or telecom company in your name will suffice.

Other information is required such as your Social Insurance Number ("SIN"), marital status, your spouse's name & SIN (if applicable), and your spouse's net income for the year. If you have any eligible children (under 18 years old), we require their full names, date of birth, and SIN(s) as well (as applicable).

- ☐ Photo ID with Address (e.g. Driver's License or Provincial Residence Card)
☐ Social Insurance Number (SIN): _____

OR

- ☐ Photo ID (e.g., Passport, Student ID, Provincial Health/Insurance Card)
☐ Mail or Bill from Utility or Telecom
☐ Social Insurance Number (SIN): _____

Please indicate your marital status:

- ☐ Single ☐ Married ☐ Common-Law ☐ Widowed ☐ Divorced ☐ Separated

If Married/Common-Law, please provide the following information:

Spouse's Full Legal Name: _____
 Spouse's Date of Birth (YYYY/MM/DD): _____
 Spouse's SIN: _____
 Net Income for This Tax Year (if filing separately): _____
 Were They Self-Employed This Year?: _____

If you have any children or eligible dependents, please provide their information below:

Child / Dependent 1's Full Name: _____
 Child / Dependent 1's Date of Birth (YYYY/MM/DD): _____
 Child / Dependent 1's SIN: _____
 Child / Dependent 1's Net Income for This Tax Year (if applicable and filing separately): _____

Child / Dependent 2's Full Name: _____
 Child / Dependent 2's Date of Birth (YYYY/MM/DD): _____
 Child / Dependent 2's SIN: _____
 Child / Dependent 2's Net Income for This Tax Year (if applicable and filing separately): _____

Child / Dependent 3's Full Name: _____
 Child / Dependent 3's Date of Birth (YYYY/MM/DD): _____
 Child / Dependent 3's SIN: _____
 Child / Dependent 3's Net Income for This Tax Year (if applicable and filing separately): _____

Child / Dependent 4's Full Name: _____
 Child / Dependent 4's Date of Birth (YYYY/MM/DD): _____
 Child / Dependent 4's SIN: _____
 Child / Dependent 4's Net Income for This Tax Year (if applicable and filing separately): _____

Child / Dependent 5's Full Name: _____
 Child / Dependent 5's Date of Birth (YYYY/MM/DD): _____
 Child / Dependent 5's SIN: _____
 Child / Dependent 5's Net Income for This Tax Year (if applicable and filing separately): _____

☐ **Previous Year Return & Notice of Assessment from the CRA** – In order to properly process this year's return, it's best to provide your previous year return to ensure that any credits that can be carried-forward (e.g., Tuition, RRSP, and/or donation credits)

☐ **T-Slips** – these are generally provided by employers (T4) or by companies where you would have worked as an independent contractor for (T4A). Financial Institutions (e.g., Banks) would likely create T3 and T5 slips. T2202 slips would come from registered educational institutions where you paid tuition fees.

- ☐ T4 / Rélevé 1 Slip(s)
- ☐ T4A / T4E / T4F / T4PS / T4RSP / T4RIF
- ☐ T5 / T5003 / T5007 / T5008 / T5013
- ☐ T3
- ☐ T2202 / T2202A / TL11A

☐ **Union Dues, Professional Fees, Donations, Medical Costs, and Receipts** – to claim these types of items on your returns, please provide copies of your receipts related to these expenses.

☐ **RRSP/RPP/SPP/PRPP Contribution Slips** – for contributions to a registered retirement savings plan or pension plan OUTSIDE of any amounts noted on your T4 or T4A slip(s).

Sole Proprietorships & Self-Employed Individuals

Business & other operating expenses can be deducted from your income as part of earning that income. Please ensure to provide copies of receipts, or at least total amounts paid into specific categories to ensure your return is processed accurately. A list of all eligible expenses can be found here: <https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/sole-proprietorships-partnerships/business-expenses.html>

Vehicle Expenses – if you used your own vehicle for business purposes, such as driving to meetings or client locations, please provide the following information:

Number of Kilometres driven to earn business income: _____

Total Kilometres driven in year (including personal use): _____

Total Spent in Year on (even for personal use):

Fuel & Oil: _____

Interest on Car Loan Payments (financed only): _____

Insurance: _____

License & Registration: _____

Maintenance & Repairs: _____

Electricity for Zero-Emission Vehicle(s): _____

Other Eligible Expenses: _____

If leased, please indicate the following (would be found on leasing documentation from dealer):

Lease Start Date: _____

Lease End Date: _____

Total Lease Charges in Year: _____

Total Lease Charges in Previous Year(s): _____

Manufacturer's List Price (MSRP) of Car: _____

Business Revenue & Tax Collection

Did you collect HST on services (Y/N)?: _____

- If yes, please indicate how much HST you've collected this year: _____

Did you remit HST during the year to the CRA (Y/N)?: _____

- If yes, please indicate how much HST you've remitted: _____

Please indicate what type of calculation you used for HST (if applicable)

- ☐ Quick Method (13% on all services)
- ☐ Input-Tax Credit Method (deduction of HST remitted from eligible business expenses)

- ☐ How much did you earn from your business operations during the tax year? Do **NOT** include deductions or HST collected: _____

- ☐ If you received any T4A slips related to your self-employed work, please provide those.

- ☐ Was your income earned as a licensed or controlled profession such as medicine, law, engineering, etc.)? If yes, what profession & who is your governing body? _____

Please also provide the following information related to your business activities:

What is the primary activity of your business? _____

Do you have any employees? If yes, how many? _____

Do you sub-contract any parts of your business or work (Y/N)? _____

Do you provide services out of your own home (seeing clients, providing direct services, etc.), or do work out of your own home (e.g. home office, remote work, etc.)? If yes, please provide information outlined below:

Do you rent or own? _____

- If you rent, please provide your monthly rent: _____



Huron Business Services
PO Box 3, Brussels ON, N0G 1H0
647-718-2184 / HuronHRPayroll@gmail.com

If you own, are you paying a mortgage? _____. If yes, please provide your mortgage interest & principal paid in the tax year (your bank will provide an annual statement stating interest paid and principal paid).

- Mortgage Principal: _____
- Mortgage Interest: _____

What is the square footage of your house/apartment? _____

What is the square footage of the space used for your business? _____

Do you use the room(s) for business use 100% of the time (no personal use) Y/N? _____

If you use the room(s)/space(s) for personal use, what percentage is used for personal use? _____