



#105 - 3631 Chatham Street | Richmond | BC | V7E 2Z1 | Tel: 604-241-7595

Date: \_\_\_\_\_ New Client  Referred by \_\_\_\_\_

Name _____	Spouse Name _____
Date of Birth _____	Date of Birth _____
Address _____	Spouse SIN _____
Home Phone _____	Spouse net income _____
Cell Phone _____	Marital Status on Dec 31, 2025:
Email address _____	Married Divorced Widowed
	Common-law Separated Single
	Date of any changes _____
Are you a Canadian citizen?	YES NO
Can CRA give your information to Elections Canada to update the voters' list?	YES NO
Did you sell Property in 2025 eligible for the <b>Principal residence exemption</b> ?	YES NO
In 2025, did you own <b>foreign property</b> or <b>investments</b> valued > \$100,000?	YES NO

**Non Refundable Credits (Check all that apply)**

- |  |  |                       |
|--|--|-----------------------|
| Disability Tax Credit (Self or spouse) | Tuition                                  | Student Loan Interest |
| Charitable Donations                   | Volunteer Firefighters/Search and Rescue |                       |
| Medical Expenses                       | First-time Home Buyers                   |                       |
| Digital News Subscription              | Teachers - classroom supplies            |                       |

**Dependants**

Name	Son\Dtr	Birthdate	Child care expenses
			Spousal support <i>Paid (deductible)</i> \$ _____
			<i>Received (taxable)</i> \$ _____

**Tax Deductions (Check all that apply)**

- |                         |                             |                  |
|-------------------------|-----------------------------|------------------|
| RRSP contributions      | Lifelong Learning Plan      | Renter's credit: |
| Home Buyer's Plan       | Employment expenses (T2200) | Rent paid: _____ |
| Union/professional dues |                             | Landlord: _____  |
| Investment fees         |                             |                  |

**Quarterly Installments** Paid in 2025? Did Self \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_

you receive a **foreign pension**? YES NO

Do you wish to **split** your **pension income**? YES NO Saved \$ \_\_\_\_\_

Remarks: \_\_\_\_\_

Please include ALL slips & **Notice of Assessment**. Additional fee to redo returns. NSF Cheques - \$50 charge

Office Use Only: Prepared by \_\_\_\_\_ Time \_\_\_\_\_ Date \_\_\_\_\_, 2026  
Amount Charged: \_\_\_\_\_ Accepted \_\_\_\_\_ Returned to Client \_\_\_\_\_

105 – 3631 Chatham Street, Richmond. B.C. V7E 2Z1

Name(s): \_\_\_\_\_

Re: Personal Tax Return Service

It is essential to have a clear understanding of the terms of our service as preparers of your personal tax return(s) filed for **2025** and subsequent years.

It is understood and agreed upon that you will provide us with accurate and complete information necessary to compile your tax return(s). We will prepare your personal tax return(s) from the information provided by you. We will not audit, review or otherwise attempt to verify the accuracy or completeness of any information provided. The responsibility for the accuracy and completeness of the representations in the tax return(s) remains with you.

Your personal tax return(s) will have the following communication printed:

Prepared without audit from information provided by the client.

We will assist you in providing additional information or explanations related to our preparation of your return(s) should any taxation authorities subsequently request it.

We wish to emphasize that this service cannot be relied upon to prevent or detect errors or other irregularities in the information provided to us.

Our professional fees will be based upon time required for each tax return.

**Please Note:** There will be an additional charge for re-doing your Return.  
The charge for N.S.F. Cheque will be \$50.00.

The above terms of our service as tax preparers shall remain in force until amended.

Yours truly,

ROBEL INCOME TAX SERVICE LTD

I (We) agree with your understanding of the terms of your service as preparers of my (our) personal tax return(s) as set out in this letter.

Per: \_\_\_\_\_

Per: \_\_\_\_\_

Date: \_\_\_\_\_