Death of Taxpayer – List of Required Information

- [ ] Authorize a Representative for CRA (attached) (note: must be signed by all parties named as executor(s))
- [ ] Engagement Letter (attached)
- [ ] Will (if there is no will, we need the court order appointing the administrator)
- [ ] List of assets (attached)
- [ ] Death certificate
- [ ] Date of birth ______________________
- [ ] Marital status ______________________
- [ ] Copy of prior year personal income tax return
- [ ] Probate application with list of assets and liabilities (P10)
- [ ] Probate documents (if applicable, when available)
- [ ] Capital gains/loss report from investment advisor on any unregistered investments held at death
- [ ] Tax slips and other tax information, when available

List of Executors:

Name: ______________________ Email: ______________________

Telephone: ______________________ Address: ______________________

Date of Birth: ______________________ SIN: ______________________

Name: ______________________ Email: ______________________

Telephone: ______________________ Address: ______________________

Date of Birth: ______________________ SIN: ______________________

List of Beneficiaries:

Name: ______________________ Address: ______________________

Date of Birth: ______________________ SIN/BN: ______________________

Name: ______________________ Address: ______________________

Date of Birth: ______________________ SIN/BN: ______________________

Name of deceased: ____

Date of death: ____

Was the will probated? ☐ Yes ☐ No

Please list any assets that were <u>not</u> probated, including those with a direct beneficiary and held jointly:

	Institution Name	Value on Date of Death
Bank account (chequing)	____________	____________
Bank account (savings)	____________	____________
Bank (other)	____________	____________
Other investments:		
RRSP/RRIF	____________	____________
TFSA	____________	____________
Non-registered investments	____________	____________
____________	____________	____________
Other property:		
____________	____________	____________
____________	____________	____________

Dated: ______________________________ Signed: ______________________________

As the executor, I acknowledge that I am responsible for disclosing all assets held at the date of death, including those that had a direct beneficiary or were jointly held.

Authorize a Representative – signature page

☒ Enable printing and EFILE of this authorization request

Select "EFILE Authorize a Representative" under the "EFILE" menu to file this authorization.

Instructions:

1. Print this page and have it signed and dated by the taxpayer or legal representative.
2. Retain a copy of the signed and dated signature page in your files for six years from the date that this information is transmitted to the Canada Revenue Agency (CRA). Do not send the signature page to CRA by mail or fax unless requested to do so.

Taxpayer information

SIN	First name	Last name

Representative information and authorization

☐	Individual	Representative ID:	
☒	Business	Firm BN:	830785127
☐	Group	Group ID:	G

Level of authorization (1 or 2): 2

Enter an expiry date, if applicable. ____________

Signature and date

☐ I am the legal representative for this taxpayer.

By signing and dating this page, you authorize the Canada Revenue Agency to interact with the representative mentioned above.

____
Name of taxpayer or legal representative

____
Signature of taxpayer or legal representative

____
Date of signature

STERLING STANFORD

CHARTERED PROFESSIONAL ACCOUNTANTS

Engagement letter - Tax Preparation Service

This letter confirms the terms of our appointment as your accountants, and it outlines the terms, nature and extent of the services we will be providing.

Responsibilities

Our services will be performed on the basis that you acknowledge and take responsibility for:

a) Supplying us with all the necessary information;

b) Ensuring the accuracy and completeness of the information supplied.

Services Provided

We will prepare and file your income tax return based on the information you provide. You tax return will only be filed once you have reviewed and signed the authorization to e-file.

Access to Information

To complete our engagement, we will require access to personal information. We will manage all personal information in compliance with our Privacy Statement, which can be found on our website.

Fees

Our tax preparation fee starts with a base charge of $225 per return ($400 for couples) which includes the preparation and filing of a personal income tax return with a maximum of 4 tax slips. The fee to prepare additional schedules will be based on time. For example, business and rental schedules, T1135 Foreign Reports and GST returns in particular will require additional time and fees to complete.

Fees based on time may be charged for further assistance with gathering, compiling, summarizing and organizing your tax information, as well as email, correspondence, phone discussions and meetings.

Responding to requests for additional information once the tax return is complete will be charged based on time. This includes follow up requests from CRA for pre and post assessment reviews.

There is a minimum $50 fee to amend your return if additional information is provided after completion.

If you require a printed copy of your tax return, there will be an additional fee of $25 per copy.

Terms

We shall be pleased to discuss the contents of this letter with you at any time and to explain the reasons for any items. If the above terms are acceptable to you, and the services outlined are in accordance with your requirements, please sign below.

The services set out in the foregoing letter are in accordance with our requirements. The terms set out are acceptable to us and are hereby agreed to.

Signed: ______________________________ Dated: ______________________________