

Preparing your Canadian return while away from Canada

Important Information

Thank you for trusting H&R Block.

You are making an investment in getting your taxes prepared by H&R Block. As part of our service, we provide year-round assistance and a solid guarantee that makes sure you are satisfied. In addition to Canadian income tax returns we also prepare U.S. income tax returns. Depending on the answers to the U.S. tax questions in the questionnaire you may have a U.S. income tax return filing requirement.

Rest assured that your Canadian (and if required) your U.S. income tax return(s) will be treated with the utmost in privacy considerations and prepared by experts in the tax preparation industry.

Here are the steps to complete your Canadian Tax Return:

1. Please read this document in its entirety including the FAQ.
2. Complete the questionnaire. As instructed gather your tax documents and along with the form please fax to: **705-946-8884**. If you prefer, you may also send it via regular mail instead of fax.

What happens next:

1. You will be contacted when your documents have been received at our office. Additionally, you will be told the name of your tax professional.
2. Upon review of your submission, your tax professional will contact you within several days:
 - for further information regarding your taxes,
 - to provide a free estimate of the tax preparation fee,
 - to inform you of an approximate completion date, and
3. Upon completion of your return(s), your tax professional will call again, to review your tax return(s) with you and to accept the payment.
4. Your tax pro will work with you to determine the best method of filing your return(s).

Frequently Asked Questions

How much does your service cost?

Your tax preparer will provide you with an estimate of the cost to prepare your Canadian and (if required) your U.S. tax return. The fee quote will be based on discussions the tax preparer will have with you, the information you provide to the preparer and the complexity of your tax situation. We guarantee that your fee will not exceed the estimate as long as we have received all required information. In addition, you will be charged a shipping cost if you request Fed EX or Express Post service.

Why do you need to know when I was in Canada?

Your tax preparer may need to know this information to determine your residency status and also to determine if you are eligible to claim Canadian credits. If you have been living in Canada for years, then date of entry is not as important as date of departure.

Why do you need to know my World Income?

Your tax preparer may need this information to determine your eligibility for Canadian credits. Depending on your Residency status to Canada, World Income may be required to be reported on your Canadian Return. To avoid double taxation any tax paid to a foreign country may be eligible for a Foreign Tax Credit.

How do I pay you?

We accept Visa, Mastercard and American Express.

Can I pay over the internet using my online bank system?

Not at this time.

For a firm estimate prior to completion of your return(s) please forward your tax documents with completed tax questionnaire to:

**H&R Block Canada, Inc.
Tax Coordinator
732 Queen Steet East
Sault Ste Marie, ON
Canada, P6A-2A9**

fax: 705-946-8884

Please call or email us if you have further questions regarding your tax situation. Remember our service is guaranteed and you can contact year-round if you require further assistance.

For further information contact:
Client Services at:

**customer.support@hrblock.ca
1-800-561-2154**

Tax Questionnaire

Please complete this form to the best of your ability. Tax Year(s) filing: _____

Identification

First Name: _____ Last Name: _____

Mailing Address: _____

City: _____ Country: _____ Code: _____

Province of Residence on December 31 of tax year or at departure from Canada: _____

Country where you reside if not the same as mailing address: _____

Preferred method of contact: home phone work phone cell phone email

Home Phone: _____ Work Phone: _____

Cell Phone: _____

Email: _____

Gender: Male Female Citizenship: _____

Single (*never married*) Common-law Married Separated Divorced Widowed

Your Date of Birth _____
year month day

Spouse's Name _____ Spouse's Date of Birth _____
year month day

Are you claiming any dependants? Yes No If yes, please provide the following information:

Child's Name	Gender	Date of Birth
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Please attach a list if you have additional dependants with name/gender/date of birth.

Residency Status

Date of entry to Canada: _____ Date of Departure from Canada: _____

Do you maintain any ties to Canada (ties may include home, family, property or investments)? Yes No

World income prior to arrival or after departure from Canada (attach foreign tax slips) \$ _____

To accurately determine your Residency Status we require a copy of last year's Canadian tax return.
Attach all Canadian income tax slips: T4's, T5's RRSP receipts, T3's, T4A's, T4RSP's etc.
Anything you feel might be pertinent. We may require additional information to prepare your return.
Your privacy is guaranteed.

U.S. Tax Questions

Are you a U.S. citizen Yes No

Are you a Green card holder? Yes No

How many days did you spend in the U.S. in 2014, _____, 2013 _____, 2012 _____?

"Days" in the U.S. refers to both extended stays as well as day trips. However, exclude:

- 1) days commuting from Canada to work in the U.S. and/or
- 2) days (less than a 24 hour stay) in transit in the U.S. between two points outside of the U.S.

Do you own property in the U.S. that you own as an investment, use personally or rent to others? Yes No

Have you filed U.S. income tax returns in the past? If so provide a copy of the most recent tax return filed and any U.S. tax slips for the current tax year to be filed.

Have you ever had your taxes prepared by H&R Block? Yes No

If so, where? (street and city if possible) _____

_____ Year: _____

Other Information: _____

Declaration

I hereby confirm all the above information to be exact, and authorize H&R Block representatives to contact me in order to complete my Canadian tax return.

Signature: _____ Date: _____