



H&R BLOCK®

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.

Rest assured that your return 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** or scan and email to: **shirley.dwyer@hrblock.ca** If you prefer, you may also send it via regular mail instead of fax or email.

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
 - to accept a deposit payable by credit card.
3. Upon completion of your return, your tax professional will call again, to review your tax return with you and to accept the balance of the payment.
4. Your return will be submitted to you for signing either by fax, email or regular mail. If submitted via regular mail it will be assembled ready for you to mail to the CRA once signed.
5. Once returned to us we will submit to the CRA International Office and send a copy to you.

hrblock.ca

Frequently Asked Questions

How much does your service cost?

Prior to completion of your return, we first require a \$50 deposit payable by credit card. Then to prepare a standard Canadian tax return we will charge between \$100 - \$130. If you have a more complex return, the fee may be moderately higher, but your tax preparer will provide you with an estimate prior to completion of the tax return. 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. We will also accept cheques with a two week delay in delivery of the tax return.

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
email: shirley.dwyer@hrblock.ca**

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.

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: _____