



Dear Personal Tax Clients:

The 2018 personal tax preparation time for is quickly approaching.

Your co-operation in ensuring that the information you provide is complete, accurate and in logical order is sincerely appreciated.

Attached is the following:

- 1) Letter of Engagement: Print name and Sign by **each adult** having their personal tax return prepared by our office.
- 2) Personal Income Tax Checklist: To help you provide all the needed information. Please check all items that apply and sign/date. **Separate form for each adult.**
- 3) Email Consent Form: As per Canadian Anti-Spam Law, we require your written consent sending you email messages related to our services. Please fill out and sign.

Upon completion of the above, please contact our office as soon as possible.

You are welcome to pay by cheque (Payable to Affinity Capital Management Inc.), cash or credit card. Balances owing to Canada Revenue Agency are your responsibility and can be paid online with CRA or online through your banking institution.

We look forward to seeing you and completing your 2018 personal income tax return.

Sincerely,
AFFINITY CAPITAL MANAGEMENT INC.

Anup Ruparelia, CFP



PLEASE SIGN AND RETURN WITH YOUR TAX INFORMATION

Letter Of Engagement

Dear Personal Tax Clients:

The purpose of this letter is to outline the nature of our involvement with the preparation of your Personal Income Tax Return for the 2018 taxation year.

It is understood and/or acknowledge that:

- a) The accuracy of the information and completeness of the representations reflected in your Return is your responsibility under the Income Tax Act. You acknowledge that the information supplied to us is, to your knowledge, correct and complete, and fully discloses all of your reporting requirements under the Income Tax Act;
- b) You confirm that you have provided us with all income and deduction items to be included in your Return and that they are correct and complete. You confirm that all sources of income have been disclosed, all deductions were incurred to earn income, and all credits claimed are supported by receipts;
- c) We will not audit, review or otherwise attempt to verify the accuracy or completeness of such information. However, we may ask for clarification of information if the need arises;
- d) If you owned certain property outside of Canada totaling more than \$100,000 at any time during 2018, it may be necessary for you to declare such ownership in your tax return(s). There are substantial fines and penalties for noncompliance;
- e) You are not aware of any illegal or possibly illegal acts for which you have not disclosed to us and all facts related thereto;
- f) Business statements included in your Personal Income Tax Return have not been audited and are, therefore, solely for your use and are not to be represented to a third party without our prior consent;
- g) We recommend that you provide us with copies of any correspondence you receive from CRA immediately. In many cases, reply deadlines apply, and if not met, proposed assessments or reassessments may be issued or opportunities to challenge issues may be lost.
- h) Should your file be audited by Canada Revenue Agency and our office is required to assist, an additional invoice will be issued to you based on time spent.

Please ensure that the receipts returned to you are retained in your records should Canada Revenue Agency require to see a copy. In addition, by law, receipts must be retained for a period of seven (7) years.

Either party may terminate this agreement immediately upon written notice.

FEES

Upon completion of your Income Tax Return or after providing advice or other service on any matters respecting the same, we will render you an invoice for services at our usual billing rates. It is agreed that this invoice will be paid upon receipt. Any amounts outstanding will be charged interest at 1% per month.

LIMITATION OF LIABILITY

The liability of Affinity Capital Management Inc. and Anup Ruparelia to you (and your family) for any claim related to professional services provided pursuant to this engagement letter in either contract, negligent misrepresentation or tort, including the proprietor, officers or employees of our firm shall be strictly limited to the amount invoiced. No claim shall be brought against Affinity Capital Management Inc. in contract, negligent misrepresentation or tort more than One year (from the date of Notice of Assessment) after the services were completed or terminated under this engagement.

If the services and terms as outlined are acceptable to you, please sign the copy of this letter in the space provided and return it to our office with your personal income tax information.

We appreciate the opportunity to be of service to you.

Sincerely,
AFFINITY CAPITAL MANGEMENT INC.

Anup Ruparelia, CFP

Please have this Engagement Letter signed by each adult party having their 2018 personal income tax return prepared by our office. Thank you.

The services and terms set out are agreed:

PRINT NAME:

SIGNATURE:

DATE: _____



2018 PERSONAL INCOME TAX CHECKLIST
To be filled out by each individual taxpayer

NAME: _____
EMAIL: _____

PHONE #: _____
SIN #: _____
Date of Birth: _____

GENERAL

Do you want to receive a full copy of your tax return by email? YES NO
 Change in Marital Status or Name? (if yes, state date of change) YES NO _____

Dependants: (Can include Parents, Grandparents, Niece/Nephew living with you)

Name	SIN	Date of Birth	Relationship	Net Income
_____	- -	_____	_____	_____
_____	- -	_____	_____	_____
_____	- -	_____	_____	_____
_____	- -	_____	_____	_____

Are you a Canadian citizen? YES NO
 Do you authorize CRA to provide your information to Elections Canada? YES NO
 Did you move in 2018? (please provide a summary of moving expenses incurred) YES NO
 Did you acquire a house in 2018? YES NO
 Is it your first house? YES NO
 Did you sell your principal residence or other real property? YES NO
 (Please provide details) (Includes Bonds, Cottage, Houses, Other personal property...etc.)
 Any Change of Use of Real Property? (Residence to Rental or visa-versa) YES NO
 Any rent or property tax paid for 2018? (if yes, state which one & provide amounts) YES NO
 Any 2018 Tax Instalment Payment Summary from CRA YES NO
 Notice of (RE)Assessment for Prior Tax Year? YES NO
 Notice of (RE)Assessment for other years if not already provided? YES NO

FOREIGN

Do you own foreign property with a cost greater than CDN \$100,000 but less than \$250,000? YES NO
 If yes, please provide details of foreign properties. Need to fill out T1135 Form
 Do you own foreign property with a cost greater than CDN \$250,000? YES NO
 If yes, please provide details of foreign properties (monthly investment statements if applicable)

Foreign Property includes:

- Shares and Bonds of foreign companies / foreign governments (held in Canadian or foreign investment account)
- Funds in foreign bank accounts
- Real estate situated outside Canada (except if owned exclusively for personal use)
- Interest in non-resident trusts / Interest or units in offshore mutual funds

Are you a Citizen or Resident of the United States? Please provide details. YES NO
 Did you work in the United States in 2018? YES NO
 If yes to either of the above, is a US Tax Return being filed? YES NO

INCOME & INVESTMENTS (if YES to any questions below, please provide details)

Employment/Commission (T4, T4A, T4PS)	YES NO
Investment (T3, T5, T5013, T5008)	YES NO
Pension (T4A, T4RSP, T4RIF, T4AOAS, T4AP, Foreign, Other)	YES NO
Universal Child Care Benefit (RC 62)	YES NO
Any Disposition of Investments during the Year? (attach summary)	YES NO
Any Realized Gains / Losses (provide summary from broker/advisor)	YES NO
Bitcoin or Other Cryptocurrency Transactions (attach details)	YES NO
Other income. (please provide details)	YES NO
Rental Income. (attach income & expense summary)	YES NO
[Please call us at (416) 333-8625 to obtain template if needed.]	
Business Income. (attach income and expense summary)	YES NO
[Please call us at (416) 333-8625 to obtain template if needed.]	
Internet Business Income (Website/Pages/Apps generating income) <i>(Please provide details)</i>	YES NO

DEDUCTIONS (if YES to any questions below, please provide details)

Employment expenses. (provide summary and a signed T2200) [Please call us at (416) 333-8625 to obtain template if needed.]	YES NO
RRSP Contribution. (provide contribution slips)	YES NO
Home buyers plan – Withdrawal / Repayment	YES NO
Childcare Expenses	YES NO
Support Payments	YES NO
Union or professional dues (only if not included on T4 already)	YES NO
Accounting Fees	YES NO
Investment Carrying Costs - Interest Expense	YES NO
Investment Carrying Costs - Investment Management Fees	YES NO

CREDITS (if YES to any questions below, please provide details)

Interest on eligible Student Loan	YES NO
Tuition Fees / Examination Fees (T2202)	YES NO
Tuition Fees / Examination Fees from dependent(T2202) [If you are planning to transfer tuition credits from your child to yourself, please have the child sign the T2202]	YES NO
Charitable Donations / Political Contributions (Please provide summary)	YES NO
Medical Expenses for self and dependents**(Please provide summary)	YES NO
Disability Tax Credit for self or dependents (signed T2201 if first time of claim)	YES NO

Please read carefully, date and sign below:

I certify that the information given to **AFFINITY CAPITAL MANAGEMENT INC.** to prepare my income tax return and any documents attached are correct, complete and fully disclose my income and deductions to which I am entitled. I am aware it is a serious offence to give false or misleading information. I understand that I am responsible for retaining copies of my tax returns and supporting documentation. I understand that I bear responsibility for tax, interest or penalties assessed by CRA due to the disallowance of any deductions or exclusions, or the taxation of any unreported income. I understand that **AFFINITY CAPITAL MANAGEMENT INC.** will not audit, review or otherwise attempt to verify the accuracy or completeness of this information.

Signature _____

Date: _____

The objective of this checklist is to help you keep your tax affairs organized. This checklist is not intended to provide, and should not be construed as providing, individual, tax, legal or investment advice, nor is it meant to cover all of your tax or other relevant considerations.

**Medical expenses include private health plans, prescriptions, attendant care costs and nursing homes

Request for Email Consent

(For NEW Clients)

According to the Canadian Anti-Spam Law which came into force on July 1, 2014, we require your written consent before sending you email messages related to the financial services that we provide to you.

As we seek to fulfil our responsibilities to you, our client, please check the boxes below to provide your consent for the different types of emails that you wish to receive from our office.

- Appointment Confirmations
- Invitations to Special Client Events
- Monthly E-newsletters
- Financial Strategies Tips
- All of the above

You are entitled to withdraw your consent at any time.

Client Name: _____

Email Address: _____

Date of Consent: _____

Signature: _____

Advisor Name: Anup Ruparelia CFP, Affinity Capital Management Inc.

Company: 45B West Wilmot Street, Suite 208B

Address: Richmond Hill, Ontario, L4B 2P3

Phone: 416-333-8625