



# Small Business Personal Tax Information

LEGAL Last Name: \_\_\_\_\_ LEGAL First Name: \_\_\_\_\_ S.I.N: \_\_\_\_\_ D.O.B (YYYY/MM/DD) \_\_\_\_\_

Full **Mailing** Address: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

### Marital Status

Married       Divorced       Common-Law       Separated       Widowed       Single

Date of Union/Separation (YYYY/MM/DD) \_\_\_\_\_ Date of Death (YYYY/MM/DD) \_\_\_\_\_ Is N&L doing spouse taxes?  
 Yes    No (if no please provide income): \_\_\_\_\_

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ S.I.N: \_\_\_\_\_ D.O.B (YYYY/MM/DD) \_\_\_\_\_

Do you have children?    Yes    No (if yes fill in the table below)

Last name	First name	D.O.B (YYYY/MM/DD)

### Who receives child tax benefits:

Do you  Pay  Receive child support?    Yes    No (if yes) Amount Monthly: \_\_\_\_\_ Start date: \_\_\_\_\_ End date: \_\_\_\_\_

Do you  Pay  Receive spousal support?    Yes    No (if yes) Amount Monthly: \_\_\_\_\_ Start date: \_\_\_\_\_ End date: \_\_\_\_\_

Canadian Citizen?    Yes    No   If no, Citizenship: \_\_\_\_\_ Did you earn income outside of Canada?    Yes    No

Did you move provinces in the current tax year?    Yes    No   If yes when: \_\_\_\_\_

Which province did you reside in on Dec 31<sup>st</sup>: \_\_\_\_\_ Did you sell a property?    Yes    No

As a Canadian citizen do you authorize the CRA to provide your name, address, and date of birth to Elections Canada for the National Register of Electors?    Yes    No

Is there any other information you wish us to know: \_\_\_\_\_

Numbers and Letters now have client portals through Ifirm to streamline the process of signing taxes, submitting documents, and proving notice of assessments and T1 Generals. This is a portal that can be accessed all year long to retrieve important tax information.

Are you interested in registering for a Client Portal?    Yes    No   If yes please ensure the email listed above is up to date.



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- You rented and occupied a rental unit for at least six months in a calendar year in British Columbia
- You are 19 years of age or older, or married or in a common-law partnership, or a parent of a child
- You were a resident of British Columbia at the end of December 31 of the year for which you are claiming the credit

If you have a spouse or common-law partner, only one credit can be claimed per couple even if both rent their own homes.  
You are **not** eligible for this credit if **any** of the following conditions apply:

- You were confined to a prison or a similar institution at the end of the year and you have been confined for more than six months in total for the year that you are claiming the credit
- You were an employee of a foreign country or a family member or a servant of the employee of a foreign country

The following amounts are not considered as rent for the credit:

- A rent that was paid to someone related to you
- A rent paid for a campsite, moorage or manufactured home site
- The rent on accommodation your employer paid for, unless the amount was included in your income for the year
- Rent paid under a rent-to-own plan

**Do not** claim this credit on a return for a person who died in the year for which the credit is claimed.

IF YOU ARE ELIGIBLE for the credit, please fill in the information below

Address	Months at address (in 2024)	Total rent paid	Landlord/Company name



# Small Business Personal Tax Information

Business Address:

Postal Code:

\_\_\_\_\_

Sole-Proprietor  Partnership

Main Product or Service: \_\_\_\_\_

Business Number (If applicable): GST Registered? PST Registered? If totals are provided (like an Excel sheet) Is N/L Filing your GST?

\_\_\_\_\_  Yes  No  Yes  No  Yes  No  Yes  No  
do these amounts include GST/PST?

### Partner Information (If applicable):

Last Name: First Name: S.I.N: D.O.B (YYYY/MM/DD)

\_\_\_\_\_

Full **Mailing** Address:

Postal Code:

\_\_\_\_\_

### Expense Checklist:

If you have a home office: \_\_\_\_\_ Sq ft Used for office, \_\_\_\_\_ Sq ft Total house.

Business Use of Home Expenses:

- public services (electricity, water)  heat  insurance  maintenance  mortgage interest  property taxes  rent

Business Expenses

- advertising  bad debts  business start-up costs  business tax, fees, licenses and dues  capital cost allowance  
 delivery, freight and express  fuel costs (except for motor vehicles)  insurance  interest and bank charges  
 legal, accounting and other professional fees  maintenance and repairs  management and administration fees  
 meals & entertainment  office expenses  property taxes  rent  salaries, wages and benefits  
 supplies  telephone and utilities  travel  cost of goods sold (building materials, food for catering, etc)  
 Other: \_\_\_\_\_

Motor vehicle expenses: \_\_\_\_\_ KM driven to earn rental income. \_\_\_\_\_ KM total driven in the tax year.

Make: \_\_\_\_\_ Model: \_\_\_\_\_ Year: \_\_\_\_\_

- Fuel  Insurance  Maintenance  Registration  Interest  Lease (if applicable)

\*Please note all motor vehicle expenses in the event of an audit require a log book as proof of use to earn income.

**By signing below, you acknowledge all the information given above in confidence to Numbers & Letters Business Solutions Ltd to be true and accurate. Numbers and Letters is a certified tax preparation service, however, the CRA makes all final decisions, assessments, adjustments, or audits. By signing this you are releasing Numbers and Letters Business Solutions Ltd. of liability, you acknowledge that any changes made by the Canada Revenue Agency (CRA) to your tax return prepared by our firm are outside our control and that we cannot be held responsible for any resulting discrepancies or obligations.**

Client Signature:

Spouse Signature:

Date (YYYY/MM/DD)

\_\_\_\_\_

NL Employee signature:

Date (YYYY/MM/DD)

\_\_\_\_\_