

Provide the details below to ensure your tax preparation process is accurate and complete. All information will be kept confidential.

1. First Name \_\_\_\_\_

2. Last Name \_\_\_\_\_

3. Email Address \_\_\_\_\_

4. If this survey is being completed on behalf of a couple, please include your partner's name and email address.

\_\_\_\_\_

5. What is your telephone number? Include area code (+1) and extension if applicable.

\_\_\_\_\_

6. What is your current residential address?  
Please provide street address, city, and province.

\_\_\_\_\_

\_\_\_\_\_

7. Is this the first time we are completing your taxes?

YES

NO

**PLEASE COMPLETE THIS SECTION ONLY IF YOU ANSWERED YES TO QUESTION 7.**

8. Do you have a CRA online account?

YES

NO

**IF YOU ANSWERED YES TO QUESTION 8:**

9. Follow attached instructions to add Verecan Wealth as your CRA representative

ACKNOWLEDGE

**IF YOU ANSWERED NO TO QUESTION 8:**

10. Provide copies of your 2023 and 2024 Notice of Assessment with tax document upload

ACKNOWLEDGE

11. How would you like to provide your files?

Digital upload (secure upload link to follow)

In-person drop off (our team will reach out to you)

12. Did your residential address change in 2025?

YES

NO

13. Do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors?

YES

NO

14. If you live in Ontario, do you authorize the CRA to share your name and email address to Ontario Health for the purpose of being contacted by email about organ and tissue donation?

YES

NO

N/A

15. If you currently receive paper copies of your Notice of Assessment, are you interested in receiving your Notice of Assessment electronically only? Note: This would require you to register for "My Account" with CRA.

YES

NO

16. If yes to the previous question, please provide the email address you would like CRA to use here:

\_\_\_\_\_

17. Are you a Canadian resident for tax purposes?

YES

NO

18. Did you or your spouse or common-law partner add a child (children) to your family in 2025?

YES

NO



19. Do you have any children or dependents under the age of 18 in 2025?

- YES
- NO

20. Did you have any childcare expenses?

- YES
- NO

21. Are you providing care for someone who meets any of the following descriptions?

- Spouse
- Your parent, grandparent, aunt, uncle, niece, or nephew
- Your child, grandchild, brother or sister under 18 years of age
- Your child, grandchild, brother, or sister 18 years of age or over with an impairment in physical or mental functions
- N/A

22. For Nova Scotia residents, have you paid fees towards sports or arts activities for children under the age of 19?

- YES
- NO
- N/A

23. Did you own specified foreign property at any time in 2025 with a total cost of more than CAD \$100,000?

- YES
- NO

24. Did you earn income from a payer in the United States in 2025 or any other foreign country?

- YES
- NO

25. Did you earn employment income in 2025?

- YES
- NO

26. Did you earn self-employment or business income in 2025?

- YES
- NO

27. Did you receive any income from investments (e.g. interest, dividends)?

- YES
- NO

28. Did you receive income from any other source?

- YES
- NO

29. If YES to the previous question, please specify the other source of income.

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30. If a resident of BC, did you rent in 2025?

- YES
- NO

31. Did you have business use of a vehicle in 2025?

- YES
- NO

32. Did you dispose of capital property in 2025 outside of your Verecan Managed Account?

- YES
- NO

33. Did you make any charitable donations?

- YES
- NO

34. Did you incur any medical expenses?

- YES
- NO

35. Did you have any tuition or education amounts to claim?

- YES
- NO

36. Did you have any RRSP or FHSA (First Home Saving Account) contributions?

- YES
- NO

37. Did you have any other deductions or credits to claim?

- YES
- NO

38. Did you buy a home in 2025?

- YES
- NO



39. Did you sell your principal residence in 2025?

- YES
- NO

40. Did you relocate for employment purposes in 2025?

- YES
- NO

41. Did you incur any expenses in 2025 to improve the safety of your home for someone over the age of 65 or someone eligible for the disability tax credit?

- YES
- NO

42. Did you convert all or part of a home from a rental property into your principal residence, or from your principal residence into a rental property in 2025?

- YES
- NO

43. Please check all documents you have available to provide. This list is not a list of required documents, only select the documents relevant to your tax situation.

- Notice of Assessment (if we are filing your return for the first time)
- Previous Year Tax Return (if we are filing your return for the first time)
- Current Year Installment Summary
- All Issued T4 Slips
- RSP Contribution Receipts
- Employment Expenses (T2200)
- Professional & Union Dues Receipts (If not included in T4)
- Interest Charges on Investment Loans (Statement of Interest Charges)
- Investment Management Fees (Annual Account Statement)
- Child Care Expenses (Receipts)
- Support Payments (Record of Payments Made)
- Tuition/Student Loan Interest (Receipts, T2202A)
- Medical (Receipts, Travel Records, Premiums you paid for private health plan)
- Digital News Subscription (Receipts)
- Adoption Expenses (Receipts)
- Charitable Donations (Receipts)

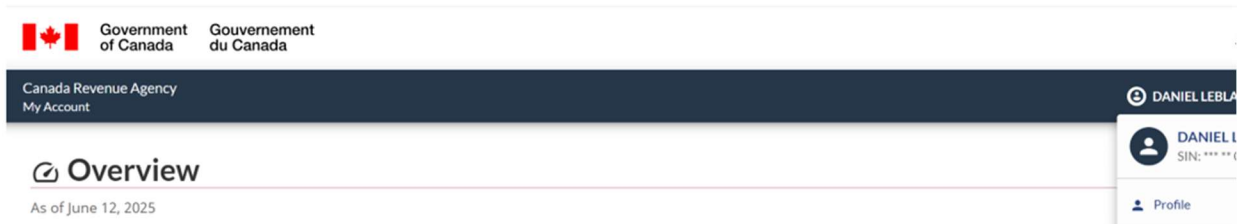
# Steps to Authorize Verecan Wealth Inc. as a representative with CRA



## Step 1: Login to your CRA My Account



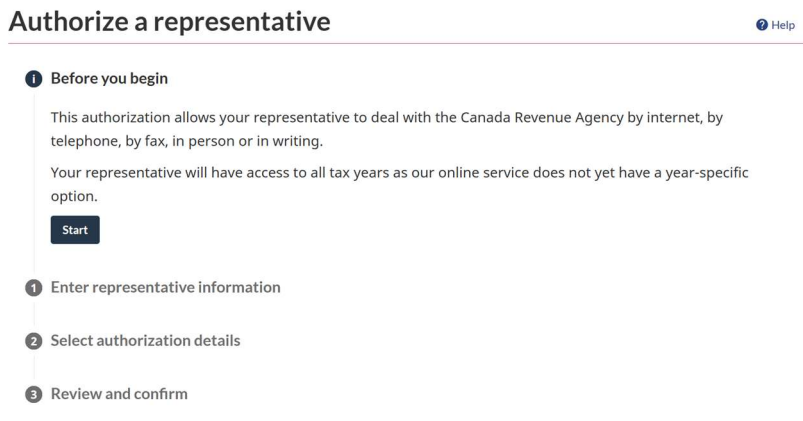
## Step 2: From the main Overview, click on your name on the right side of the page, then click Profile



## Step 3: Scroll down to the Authorized representative(s) section



## Step 4: Click on + Add then click on Start



# Steps to Authorize Verecan Wealth Inc. as a representative with CRA



**Step 5:** Enter the Verecan business number 832801815 as displayed below then click on Search and Next

Authorize a representative [Help](#)

Before you begin

1 Enter representative information

Fields marked with an asterisk ( \* ) are required.

To authorize a representative to deal with the CRA on your behalf enter:

- **Representative identifier (RepID):** It is a 7-character alphanumeric code
- **Group identifier(GroupID):** It is a 6-character alphanumeric code, beginning with a G
- **Business number (BN) of a business:** It is a 9-digit identification number, if you enter a BN, you are authorizing CRA to deal with anyone from that business.

\*RepID, GroupID or BN

832801815

The following representative has been identified:

Representative information	
Name:	VERECAN WEALTH INC.
BN:	832801815
Phone number:	9028307291
Fax number:	902-477-3380

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**Step 6:** Select Level 2, Yes and Does Not Expire as displayed below

Authorize a representative [Help](#)

Before you begin

Enter representative information

2 Select authorization details

Fields marked with an asterisk ( \* ) are required.

\* Authorization level

Level 1 - Allow your representative access to information only.

Level 2 - Allow your representative access to information and to make certain account changes.

> Level 1

> Level 2

\* Online access

Online access allows a representative to deal with the Canada Revenue Agency by internet, by telephone, by fax, in person or in writing.

Yes

No

\* Expiry date

YYYY - MM - DD  Does not expire

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# Steps to Authorize Verecan Wealth Inc. as a representative with CRA



## Step 7: Tick the Confirmation box then Submit

Authorize a representative [Help](#)

- Before you begin
- Enter representative information
- Select authorization details
- 3 Review and confirm**

Fields marked with an asterisk (\*) are required.

The following representative will be authorized:

Representative information	
Name:	VERECAN WEALTH INC.
BN:	832801815
Phone number:	9028307291
Fax number:	9024773380

Representative authorization <a href="#">Edit</a>	
Online access:	Yes
Authorization level:	2
Expiry date:	Does not expire

\* Confirmation

I confirm that the CRA may deal directly with the above named representative for the specified level of authorization. I acknowledge that these activities may occur without the CRA advising me.

[Back](#) [Submit](#)

## Step 8: Success

Authorize a representative - Confirmation [Help](#)

As of June 12, 2025 [Print/Save](#)

**Success**  
You have successfully authorized a new representative: VERECAN WEALTH INC.

You have authorized the following representative:

Representative information	
Name:	VERECAN WEALTH INC.
BN:	832801815
Phone number:	9028307291
Fax number:	9024773380

Representative authorization	
Online access:	Yes
Authorization level:	2
Expiry date:	Does not expire

[Return to Authorize representatives](#)