

# Preparing your Canadian return while away from Canada

There are a few options available to you when you are preparing your Canadian return while away from Canada:

## Option 1: By email, fax or mail

*Here's how it works:*

### Step 1: Tell us about your tax needs

- Complete the [Tax Questionnaire](#)
- Gather your tax documents, including:
  - A copy of your previous year's Notice of Assessment
  - Your tax slips (e.g. T4s, RRSP receipts, T4As, etc.)
  - Any other documents or receipts that you feel are important (e.g. medical or donation receipts)
- Send us your documentation using your preferred method:

**Email:** awayfromcanada@hrblock.ca

**Fax:** 1-705-946-8884

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

### Step 2: A Tax Expert will contact you

A Tax Expert will contact you to:

- Ask for any additional information they need to complete your tax return(s)
- Provide a *no-obligation* estimate for the cost of your tax preparation as well as an estimate for how long your return(s) will take to prepare

### Step 3: We'll prepare your tax return

Once you give the go-ahead, your tax return(s) will be prepared by your Tax Expert, ensuring that you have the highest possible refund or the lowest possible tax liability.

### Step 4: Approve your return and we'll file it for you

Your return will be securely shared with you over epost. You can review it and request changes if required. When you're satisfied, simply sign your return to approve it. We'll file with the CRA (and Revenu Québec if applicable) and send you the filed copy.

### Step 5: Relax! Your taxes are done!

**This service supports all tax scenarios.**

## NEW FOR 2018! Option 2: Online Tax Expert

- 2018 returns only
- T1 (personal) tax returns only
- Must have a Canadian mailing address

At this time, the service does not support the preparation of returns for deceased persons or AgriStability.

*Here's how it works:*

### Step 1: Create an account

Visit our Online Tax Expert service at <https://www.hrblock.ca/online-tax-expert/> and click on **Get Started**. You can learn more about the service, including the cost, on the website.

### Step 2: Tell us about your tax needs

Follow the prompts on your Online Tax Expert dashboard. You will be asked to create a tax profile, confirm your identity, authorize H&R Block as your representative, and upload your tax documents (using pictures from a mobile device and/or scanning).

You'll be guided step-by-step, with access to a Tax Expert along the way, to ask any questions you may have.

#### **Important:**

- Use the **Messages** tab on your dashboard to send a message letting us know that you are a Canadian living abroad.
- If you are unable to pass the identity confirmation required for this service, please consider switching back to **Option 1: By email, fax or mail**.

### Step 3: Pay for your service

Complete a secure, online payment for the Online Tax Expert service.

### Step 4: Your tax return is prepared

Your Tax Experts will complete your tax return and file on your behalf. Don't worry, you'll get a chance to review everything before we file! Any documents that require signing can be completed online, so there's no printing required.

### Step 5: Relax! Your taxes are done!

# Frequently Asked Questions

## Which option should I choose?

We are excited to offer you two tax preparation options when you are outside of Canada: by faxing, mailing, or emailing us your documents and a completed [Tax Questionnaire \(option 1\)](#), or by using our brand-new Online Tax Expert service (**option 2**).

The benefit of the Online Tax Expert service is that all your correspondence is done online through a personalized dashboard, and the cost for the service is a flat fee (the same cost no matter how complex your taxes are). However, because this is a new service, it cannot fully support all tax scenarios. Read through the information provided in this package to learn more about the restrictions on who can use this service. To learn more about the Online Tax Expert service, visit <https://www.hrblock.ca/online-tax-expert/>.

If you do not qualify for the Online Tax Expert service or prefer to communicate over the phone rather than online, we'd suggest you choose option 1.

## How much do these services cost?

**Option 1:** If you choose to **fax/mail/email** us your tax information, your Tax Expert will provide you with a no-obligation estimate prior to the completion of your tax return, once they have had a chance to review your specific situation.

**Option 2:** If you choose to use the **Online Tax Expert** service, you can visit <https://www.hrblock.ca/online-tax-expert/> to review potential costs.

## How do I pay you?

**Option 1:** If you choose to **fax/mail/email** us your tax information, you can pay using Visa, Mastercard, or American Express. Payment can be made over the phone or through a secure Canada Post epost Connect conversation ([learn more](#)). We do not accept payment by email money transfer (EMT).

**Option 2:** If you choose to use the **Online Tax Expert** service, you will be prompted to pay on your personalized dashboard through a secure online transaction by Visa, Mastercard or American Express.

## Why H&R Block?

We know how to get you the maximum refund because we've been at it for more than 50 years and have done more than 50 million tax returns. We're committed to making your tax experience the best it can be. From year-round support to guaranteed pricing, the **H&R Block Advantage** will make your tax time a lot easier.

## Is this safe and secure?

**Absolutely.** We know taxes are stressful enough, without having to worry about how your data is being handled or secured. H&R Block Canada uses multi-factor authentication, industry-standard safeguards, and TLS data encryption. We follow all the same protocols and requirements that are used by other tax preparation services, and all major financial institutions.

## For further information, please contact us:

1-877-HRBLOCK  
awayfromcanada@hrblock.ca

# Tax Questionnaire

What tax year(s) would you like to file for? (select all that apply)

2018  2017  2016  2015  Other: \_\_\_\_\_

## Section 1: Tell us about you

First name

Last name

Date of birth (YYYY-MM-DD)

Citizenship

Gender

- Male  
 Female

## Section 2: Your mailing address

Mailing address (ie 123 Home Street)

City

Province/State/Region

Postal/Zip code

Country

## Section 3: Your residency

When did you **leave Canada**? (YYYY-MM-DD)

What **country** are you currently staying in?

In what **province** were you living when you left?

**How long** do you intend to be away from Canada?

What is the **reason for your absence** from Canada? (ie work, school, retirement, visiting relatives...)

In what country do you have a **permanent home**? (Or, do you have one in both or neither countries?)

If **married or common-law**, is your spouse (and children, if you have any) living with you in the other country?

- Yes  
 No

Do you have any **foreign income** to claim?

\$

*Leave blank if you have no foreign income to claim. If you do have foreign income, your Tax Expert will follow up with additional questions.*

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## Section 4: Your contact information

Home phone no.

Cell phone no.

Work phone no.

Email

What is your preferred method of contact?

- Home phone
- Cell phone
- Work phone
- Email

## Section 5: About your family

What is your **current marital status**?

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

Would you like to have your spouse/partner's taxes **prepared at the same time** as yours? *(if applicable)*

- Yes
- No

Are you claiming any **dependants**? (ie children)

- Yes
- No

Did your marital status change in the year(s) that you would like your taxes prepared for?

- Yes
- No

If yes, what was your marital status prior to the change and when did the change occur?

## Section 6: Your spouse (if applicable, if not skip to Section 7)

First name

Last name

Date of birth (YYYY-MM-DD)

Citizenship

Gender

- Male
- Female

Spouse's net income\*

\*Only required if their taxes are not being prepared with yours

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**Section 7: Your dependants** (if applicable, if not skip to Section 8)Please provide the following information **for any dependants that you are claiming**:

First &amp; last name

Date of birth (YYYY-MM-DD)

Gender

First &amp; last name

Date of birth (YYYY-MM-DD)

Gender

First &amp; last name

Date of birth (YYYY-MM-DD)

Gender

First &amp; last name

Date of birth (YYYY-MM-DD)

Gender

*Please attach a list if you have additional dependants with name, date of birth and gender.***Section 8: Is there anything else you'd like us to know?** (optional)**Section 9: Tax history**

Have you ever had your taxes prepared by H&amp;R Block?

- Yes  
 No

Have you ever filed a Canadian tax return before?

- Yes  
 No

**If you have filed with H&R Block before, what location did you use?**

Street/location (if you remember)

City

Province

**Section 10: Declaration**

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

Date (YYYY-MM-DD)

Signature