

Engagement letter - Tax Preparation Service

This letter confirms the terms of our appointment as your accountants, and it outlines the terms, nature and extent of the services we will be providing.

Responsibilities

Our services will be performed on the basis that you acknowledge and take responsibility for:

- a) Supplying us with all the necessary information;
- b) Ensuring the accuracy and completeness of the information supplied.

Services Provided

We will prepare and file your income tax return based on the information you provide. Your tax return will only be filed once you have reviewed and signed the authorization to e-file.

Access to Information

To complete our engagement, we will require access to personal information. We will manage all personal information in compliance with our Privacy Statement, which can be found on our website.

Fees

Our tax preparation fee starts with a base charge of \$175 per return (\$300 for couples) which includes the preparation and filing of a personal income tax return with a maximum of 4 tax slips. The fee to prepare additional schedules will be based on time. For example, business and rental schedules, T1135 Foreign Reports and GST returns in particular will require additional time and fees to complete.

Fees based on time may be charged for further assistance with gathering, compiling, summarizing and organizing your tax information, as well as email, correspondence, phone discussions and meetings.

Responding to requests for additional information once the tax return is complete will be charged based on time. This includes follow up requests from CRA for pre and post assessment reviews.

There is a minimum \$50 fee to amend your return if additional information is provided after completion.

Terms

We shall be pleased to discuss the contents of this letter with you at any time and to explain the reasons for any items. If the above terms are acceptable to you, and the services outlined are in accordance with your requirements, please sign below.

The services set out in the foregoing letter are in accordance with our requirements. The terms set out are acceptable to us and are hereby agreed to.

Signed: _____

Dated: _____