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Toronto: (647) 827-0790 Calgary: (403) 456-6089 Edmonton: (780) 328-4404 Vancouver: (778) 588-6256

Acute Services is a progressive company featuring a powerful tax planning division. Our diverse knowledge in financial plans has allowed us to better prepare the tax returns of clients with implemented financial strategies.

Allow us to briefly explain the benefits of having your tax plans prepared by our professionals.

- Our team consists of accountants and financial planners who are well versed in how to prepare tax returns which emphasize a financial plan's tax benefits. These professionals have advanced designations and training in these fields.
- We have developed a systematized process which efficiently allows us to collect the necessary information to file your tax return. Clients are encouraged to email, mail, or fax our comprehensive tax package back to us which will allow our professionals to examine all potential deductions and credits. This research and prepare process makes us excel in our industry.
- As an added value service, we offer meetings and extensive phone conversations to discuss your returns, review your deductions/credits, and establish future tax planning. This personal service will provide the comfort in knowing that your tax issues are being handled in an optimal manner and that we are on top of future tax issues.
- The competitive rate of \$85 for a standard tax return rivals the prices of most accounting practices. So, you know that we are respectful towards you and your finances.

With our expertise and proven strategies you can feel safe and secure that your tax issues are handled properly. Our team of quality assurance specialists is working around the clock to meet your needs. We would like to work with you to resolve your tax issues.

If you have questions about our services or enquiries please email our tax department at Taxation.Acute@gmail.com.



T1 Personal Tax Return Checklist

Thank you for allowing us to assist you in the preparation and filing of your T1 Personal Tax Return(s). To assist us in this process please be accurate and detailed in the preparation of the information for our accountants. Please use the following checklist in assembling the information required to allow us to prepare your personal tax returns and maximize your tax savings:

Please mail, fax, or email the necessary information to our office.

STANDARD INFORMATION

- T1 Personal Tax Return Questionnaire (included in this package).
- Signed T1 Personal Tax Return Letter of Engagement (included in this package).
- Signed form T1013.
- Previous years T1 Personal Tax Return.
- All income slips (ie. T4, T4A, T5 etc.).
- Notice of Assessments from previous year.

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OTHER POTENTIAL INFORMATION

- Employment related expenses – if applicable this could, for example, include expenses related to a home office, automobile, food, and entertainment expenses (be sure to include a form T2200 signed by your employer). If you need assistance with this please contact us.
- Other expenses (ie. interest on money borrowed for investments, investment counsel fees, moving expenses, child care expenses, alimony, safety deposit box rentals, accounting consultation fees, pension plan contributions).
- Other investments (ie. realestate, securites investments) – include financial statements.
- Other receipts (ie. RSP contributions, professional dues, charitable donations, political contributions).
- Tuition fees – Form T2202A “Tuition and Education Amounts Certificate Required”. All applicable educational institutions will be able to provide you with this form.
- Medical/dental expenses.
- Information regarding disability to you or your dependants (Form T2201 “Disability Credit Certificate” required).
- Information regarding Isolated Area Deduction/Northern Residents Deduction.
- Child Tax Credit receipts.
- Receipts for income tax installments or payments of tax.
- Other personalized information from Revenue Canada.
- Information regarding any sole proprietorship or partnership revenues and expenses.



T1 Personal Tax Return Questionnaire

1. Are you a new or an existing client? New Existing

2. Date: _____

3. Personal information:

You

Spouse

Name: _____

SIN: _____

Citizenship: _____

Birth Date: _____

Marital Status: Single Married Common-law

Divorced Widowed Separated

Current Address:

Email: _____

Phone #: _____

4. Province of residence as of December 31 for the tax years in which we are preparing tax returns:

5. For which year(s) are we preparing tax returns?

6. Dependants

Birth Date

Income

SIN

7. Have you owned or held foreign property with a total cost of more than \$100 000 Canadian?

Yes No

8. Is there any other abnormal or miscellaneous information regarding these tax returns that we should be aware of?

9. Would you like someone to contact you regarding consultations in your income tax planning?

Yes No

T1 Personal Tax Return Letter of Engagement

It is desirable to have a clear understanding of the terms of our engagement as preparers of your personal tax return(s) for 2008 and subsequent years.

It is understood and agreed that you have provided us with accurate and complete information necessary to compile such tax return(s). We will prepare your personal tax return(s) using the information provided by you. We will not audit, review or otherwise attempt to verify the accuracy or completeness of any information provided. That responsibility remains with you.

We will assist you in providing additional information or explanations related to our preparation of your personal tax return(s) should any taxation authorities subsequently request it. We wish to emphasize that this engagement cannot be relied on to prevent or detect errors or other irregularities in the information provided to us.

The rate to prepare a standard personal tax return is \$85 and the rate to prepare a tax return which includes an advanced schedule (ie. Small business or real estate rental) is \$150. This includes:

- Preparation and remission of a T1 personal tax return
- Inclusion of all of your tax slips (ie. T4s, T5s, RRSPs,)

Completion of additional schedules (ie. moving expenses, business expenses, CCA schedules, extensive stock/option trading) will be subject to an additional fee of \$100/hour. Bookkeeping, gst, and payroll calculation are subject to a \$40/hour fee. Aside from the time required to collect information, any additional tax consultations and work after the initial filing of the tax return will be charged at \$100/hour. All fees are due upon reception of the work completed. A 2.5% per month late penalty will be charged on all invoices outstanding more than 30 days.

I agree with your understanding of the terms of your engagement as preparers of my personal tax return(s) as set out in this letter.

Signature

Date

Name (Please Print)

Promotion Code



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