



**WILLINGTON MARTIN CPAs**

Professional Corporation  
Independent Member Firm of



**Porter Hétu International**  
Professional Services Group

## PERSONAL TAX RETURN ENGAGEMENT LETTER

(One per family)

March 6, 2017

Dear Client:

We appreciate the opportunity to work with you and advise you on income tax matters. The *Income Tax Act* imposes penalties on you **and** on us if we fail to observe due care in reporting on your income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients to confirm the following arrangements by signing this letter and returning it to us.

### OUR RESPONSIBILITIES

1. Prepare your 2016 personal income tax returns and other filings based on information that you provide to us
2. Prepare your tax return correctly according to the law
3. Hold all personal information in confidence in compliance with our Firm Privacy Statement.

### YOUR RESPONSIBILITIES

1. Provide to us in a complete and timely manner **all** the information required to prepare and complete accurate returns
2. Review the draft return that we prepare before you sign the authorization for us to EFILE
3. Inform us of all interest(s) you held in foreign properties with an aggregate cost in excess of \$100,000 CAD at any time in 2016, as well as all income from any foreign properties regardless of their aggregate value.

### SUPPORTING DOCUMENTATION

We will provide a summary of your completed tax return in electronic form. If you wish to receive a paper copy, please request it. You should retain your copy and all the documents, cancelled cheques and other data that form the basis of your income and deductions, for seven years following the date of assessment of the return. This archive can be in either electronic or paper form.

**Professional Strength Personal Service Practical Solutions**

30 Via Renzo Drive, Suite 200, Richmond Hill, Ontario, Canada L4S 0B8  
Phone: (416) 848-1585 Fax: (866) 790-3095 Website: [www.inbalance.org](http://www.inbalance.org)

**FEES**

Our fee is based on graduated hourly rates charged for time worked on your return at various levels of complexity. Any disbursements (such as courier or Xpresspost) will be added to our fee. Work required after your return is filed (such as a pre-assessment review) will be charged separately. Fees are due prior to filing your tax return. We will provide a PayPal link with your invoice, to make a credit card payment. Online banking transfers and cheques are also gladly accepted.

**ELECTRONIC COMMUNICATIONS**

Unless we are advised to the contrary our services may be conducted and obligations performed by the electronic transmission of information, documents and data, including confidential and sensitive information. Electronic transmission may include file transfer and internet email. If the communication relates to a matter of significance and there are concerns about possible effects of electronic transmission, a hard copy of such transmission should be requested from us. You are responsible for the security of your files once they are downloaded from our website or emailed to you.

**SUMMARY**

**We will prepare your personal income tax return based on information that you provide to us. We will not audit or otherwise verify the data you submit, although we may ask you for clarification of some of the information. Responsibility for the final tax return rests with you.**

If you have any questions about these or other matters relating to any of our professional services we would be pleased to discuss them.

Sincerely,



Wellington Martin Professional Corporation

I accept the foregoing terms and conditions.

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Signature \_\_\_\_\_ Date \_\_\_\_\_

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Signature \_\_\_\_\_ Date \_\_\_\_\_

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Signature \_\_\_\_\_ Date \_\_\_\_\_

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Signature \_\_\_\_\_ Date \_\_\_\_\_

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Print Family Name \_\_\_\_\_

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