



WILLINGTON MARTIN CPAs

Professional Corporation
Independent Member Firm of



Porter Hétu International
Professional Services Group

PERSONAL TAX RETURN ENGAGEMENT LETTER

(One per family)

March 5, 2021

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. To ensure an understanding of our mutual responsibilities, we ask all clients to confirm the following arrangements by signing this letter and include it with your personal tax documents.

OUR RESPONSIBILITIES

1. **Prepare** your 2020 personal income tax returns and other filings according to the law, based on information that you provide to us.
2. Hold all personal information in confidence in compliance with our Firm Privacy Statement.

YOUR RESPONSIBILITIES

1. **Provide Information** - complete and timely, **all** the information required to prepare and complete accurate returns.
2. **Review** - the draft return we send you before you sign the authorization for us to EFILE
3. **Foreign properties** - costs of \$100,000 CAD or more at any time in 2020. Inform us of **Ownership and Income** from any foreign properties regardless of the aggregate cost. As a resident of Canada, you must report your worldwide income on your Canadian tax return.
4. **Retain** – your copy of the completed tax return 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.

OUR DELIVERABLES

1. Provide your completed tax return with slips in electronic form. Paper copies **ONLY** on request.

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

FEES

Our fee is based on graduated hourly rates charged for time spent at various levels of complexity. Any disbursements (such as courier or Xpresspost) will be added to our fee. Fees are due prior to filing your tax return. Work required after your return is filed, either relating specifically to your return (such as a missed slip or a CRA initiated processing review) or as a separate consulting matter, will be charged separately. Online banking transfers or cheques are preferred. To pay via credit card, we provide a PayPal link only on request.

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. 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.

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.

Signature _____ Date _____

Signature _____ Date _____

Signature _____ Date _____

Signature _____ Date _____

Print Family Name _____

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