

## Personal Income Tax Packages

- NOTES:**
- This form no longer needs to be filled out. It is for informational purposes only.
  - Use this side to select a pricing package - check the appropriate box on the long questionnaire we send you.
  - Page 2 contains our current year's pricing - for your information only.

### Section 1 - Tax Return Packages

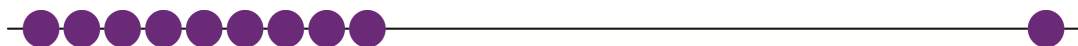
Description	Platinum	Gold	Silver
<b>Primary services:</b>			
Preparation and e-filing of 2023 T1 personal tax return	✓	✓	✓
Pick up / drop off service*	✓		
CRA Audit/Review Insurance	✓	✓	
T1 completion time (from date of receipt of <b>ALL</b> tax documentation)**	3 bus. days	1-2 weeks	3 weeks
Pre/post-prep meetings	✓	✓	
Instant Notice of Assessment	✓	✓	
Tax planning	✓		
<b>Other Services &amp; Benefits:</b>			
Secure, confidential data transfers	✓	✓	✓
Unlimited access (phone/email)	✓	✓	✓
Unlimited <i>priority</i> access on your terms (when/where)	✓		
Service Guarantee & Price Guarantee	✓	✓	✓
Payment accepted by credit card***	✓	✓	

\*Price for pick up/drop off service includes a radius of 10 kms from our office. Please request a quote for service outside of this area

\*\*While we always encourage you to bring us your documentation earlier, in order for your taxes to be GUARANTEED to be completed by the tax deadline, we must received ALL tax documentation as follows:

- Silver Package - on or before April 12, 2024
- Gold Package - on or before April 19, 2024
- Platinum Package - on or before April 28, 2024

\*\*\*Payment for all packages is accepted by cash, cheque, e-transfer & debit. Payment for Platinum and Gold is also accepted by credit card.



## 2023 Personal Tax Pricing

### Section 2 - Type Of Return (for reference only)

		-----Packages-----		
		Platinum	Gold	Silver
2a. Senior/Student Simple	Seniors 65 yrs or over, with CPP/OAS income ONLY, or full-time students with T4's ONLY. Does NOT include other pensions, investments, donations, medical, etc.	135.00	90.00	70.00
2b. Senior/Student Special	Seniors over 65 yrs or full-time students, with up to 5 tax slips and simple medical expenses ONLY (up to 5 receipts/statements, MUST be totaled by person, does not include calculations for partial insurance coverage or multiple calendar years). Does NOT include complex investments	155.00	105.00	80.00
2c. Simple	Simple returns with up to 5 slips / receipts - Does NOT include medical or complex investments	185.00	120.00	95.00
2d. Standard	Up to 10 tax slips, simple medical expenses only (unlimited receipts/statements - MUST be totaled by person, does not include calculations for partial insurance coverage or multiple calendar years) and simple investments only (up to 2 T5008's, must include realized gain/loss report)	215.00	140.00	110.00
2e. Complex	Includes unlimited tax slips and receipts, and more involved items, such as employment expenses, moving expenses, sale of principal residence, foreign tax slips, complex investments, complex medical expenses, etc.	255.00	165.00	130.00

### Section 3 - Add-On Menu (for reference only)

3a. Self Employed - Basic	Preparation of T2125 or T776 where revenue & expenses are already compiled, no home-office or auto expenses - this charge is PER business statement**	100.00	65.00	50.00
3b. Business / Employment Expense Schedules	Add-on of home-office OR auto expenses (re: 2e. or 3a.). Price is PER schedule	50.00	30.00	25.00
3c. HST Return	Preparation and net-filing of HST return from self-employment	100.00	65.00	50.00
3d. Missing Tax Slips	Fee is PER tax slip not provided to us. It will be download, as available, from CRA and included in your return and a copy will be provided to you for your records	5.00 per slip	5.00 per slip	5.00 per slip

### Section 4 - Optional Extras (to be indicated on questionnaire)

4a. Notice of Assessment	Notice of Assessment will be printed for you upon filing, as available	included	included	10.00
4b. Paper Filing	Fee for printing and compiling return should you prefer to, or are required to mail your return to CRA rather than e-filing	25.00	25.00	25.00
4c. Payment by credit card	Pay for your tax preparation service by credit card	included	included	5% premium
4d. Priority next day service	Return completed by the day after receipt of all tax documentation	10% premium	20% premium	30% premium
4e. Early-Bird Discount	Early-bird discount applies if ALL tax documentation is received by <b>March 22, 2024</b>	10% discount	10% discount	10% discount
4f. CRA Audit/Review Insurance	Should CRA request information, or conduct a review or audit of this return, we will liaise between you and CRA and assist wherever possible to bring the matter to a close as quickly and painlessly as possible	included	included	15% premium

Revised Feb-2024

\*\*A separate quote will be provided for those wishing to have revenue & expenses compiled for them

All prices are guaranteed until December 31, 2024, after which they are subject to change.