

## **2023 Personal Income Tax Preparation**

Please carefully review the information below and attached fillable forms.

**\*\*We have discontinued the mailed-out envelope and have replaced this with the attached fillable checklist and forms\*\***

Please ensure all members of your family receive copies of the checklist and any fillable forms they may need while gathering their tax information. These forms will be sent via portal if applicable this year and are available on our website. In future tax years we are directing our clients to go to our website in place of sending a package to clients with a portal account.

This checklist is a general guide for information that we require to correctly prepare your personal income tax return.

- Please review and fill out the items on the checklist, returning this along with your tax documents, and any of the summary sheets required.
- Make corrections to your address, provide us a current cell phone number and email address if required

All your information slips and schedules should be gathered and delivered to our office no later than **April 12<sup>th</sup>, 2024**. We cannot guarantee your return will be completed if it is not received in our offices by that date.

### **Delivery:**

- Our method of delivery is digitally via portal when you have your tax documents gathered and ready for us to prepare, please upload them all at once with the attached checklist and any summary sheets applicable to your portal.
- If you do not have a portal account, you may email your documents to [info@givens.ca](mailto:info@givens.ca) and we will work to setup your client portal account

### **Medical, Donation and Other Income/Expenses:**

- We have included a medical summary spreadsheet for you to summarize your medical expenses by each taxpayer.
- We ask that you summarize your donation slips, self employment income, rental income, and farm income as needed.

- These forms provide a quick overview of any expenses you may have overlooked
- These resources can be located on our website for your use.

### **Fees**

- Fees for our services will be billed in advance with the expectation of full settlement before the work commences

### **E-File Authorization**

- We do not e-file your income tax return until you have had the opportunity to review it.
- We require you to sign the authorization which will be prepared at the same time as your income tax return and available to sign at time of completion.

### **Missing Forms**

- Please note that Canada Revenue has an aggressive penalty system in place for missing T3, T4, T4A and T5 slips.
- As these penalties are severe, we encourage you to ensure that you have all your information slips before bringing your income tax return to us.
- As follow up adds considerable time to preparing your income tax return, we cannot be responsible for missed information slips.

### **Principle Residence**

- All taxpayers that sell their primary residence must report the sale of their home on their tax return.
- If you sold your home in 2023, please fill this out on the checklist to ensure we are aware.
- Failure to report this on your return do so could result in a penalty.

We will make electronic copies of the slips and other information to comply with Canada Revenue Agency's requirement for Givens LLP to keep copies of this information.

Thank you for continuing to allow us to prepare your personal income tax return.