



INCOME TAX PRICELIST SHEET

(NO APPOINTMENT REQUIRED FOR DROP OFF WHEN USING OUR DROPBOX)

Email: info@waterdownba.ca

Tel 905-407-7370 / 905-963-7370

We supply our clients with a free SmartVault cloud account, to upload their tax paperwork and in turn receive a full electronic copy of their tax return. We take our clients confidentiality very seriously. With CRA's effort to curb scams and fraud, please do not email any documents that contain your SIN and DOB.

Please select your chosen package below: All prices are per return and applicable to HST. Initials:

Filing fee

Filing fee applicable to each return. \$6.99 for each electronically filed return and \$25 applicable to each paper filed return.

Verify information with CRA - Included with ALL packages

All packages automatically include verification with CRA for missing information slips when we are working on your file. We will advise you if we find any missing Tax slips as well as print a copy for you. We only have access to what is filed with CRA at the time we check. There will be a fee of \$5.00 per slip that we pull to include with your income tax return. Should you purchase our gold & Platinum services, we will waive the charges for pulling your information slips.

SCANNING SERVICE.

- We've introduced a new service, as we move to be more paperless and environmentally conscious.
- Waterdown Bookkeeping and Accounting can scan in all your medical receipts, business receipts, etc. or any other additional paperwork related to your tax return.
- Please remove staples from your receipts, if this is a service you would like to take advantage of. We will then upload your complete tax file, including scans, to your SmartVault account for retrieval.
- We will still offer our regular paperbound tax file for those you need them, for a nominal fee.

Priority.

- Skip the wait, prioritize your file with a 3 day turnaround. If you have multiple linked returns (Spouses, children), this fee will apply to each return

These services are additional costs. Or you could sign up for a CRA My Individual Account to access most of this information on a self-service bases through their website.

Express NOA.

- Receive your Notice of Assessment the day after your return is E-filed. (As we batch E-file each night)
- Charge is per person / per year / per NOA

This is perfect if you find yourself needing to receive your NOA quickly for reasons such as re-financing your mortgage. Without this add-on, your NOA will be mailed to you in the regular time frame of 5-7 business days plus mailing time. With this option selected, CRA will not send a copy via mail.



INCOME TAX PRICELIST SHEET

PACKAGES

BASIC SERVICE.

Seniors, over 65 yrs, with ONLY basic CPP / OAS income

Does NOT include other pensions, investments, charitable donations, medical, or income splitting (must move up to SILVER or higher)

SILVER SERVICE.

Income only, no deductions allowed other than exceptions for Seniors / Students as listed (Excludes any situation that additional services are required. See page 3 for details.) No complex situations requiring additional priced items. See additional services.

BASIC return - max 5 info slips (T4, T4A)

OR

- **STUDENTS** must be full time student in high school or post-secondary school during tax year and under 21 years of age
- includes T4's from part-time/summer jobs.
Should file returns to create future RSP contribution room & collect HST credits, and Trillium Tax Credits (if applicable)

GOLD SERVICE.

return - up to 10 information slips

INCLUDES:

Charitable Donations

Medical Receipts

Union Dues

RRSP

Income/contribution

Student Loan

Interest Tuition &

Education Amounts

Child Care Expenses

Support Payments

Pension Income Splitting

Pension Income Splitting

PLATINUM SERVICE.

INCLUDES everything above in GOLD Service, plus:

- UNLIMITED information slips & receipts
- Employment Expenses (with totals provided)
- Moving Expenses (with totals provided) (we have a simplified info form on request)
- Foreign pension
- Simple investment reporting (buy/sell of shares, etc) which include T3's, T5's or T5008 accompanied with realized gain/loss report. All other investing is considered complex and is priced separately

ADDITIONAL SERVICES



INCOME TAX PRICELIST SHEET

**All services below may only be added
onto GOLD level or higher**

Rental Property Income (for each property to be reported)

Price is for preparation of T776 form and review of expenses

- Totals must be provided for each expense category on the rental activities form accessible through the link below. If receipts or other forms are provided, or additional help is required to complete the form additional costs will apply. There is no additional cost for a verbal review of the form if you are new to using the form.
- Use our checklist to help you prepare your records!

Self-Employment / Business Income (T1 return - Non-Incorporated)

Price is for preparation of T2125 form and review of expenses

- Totals must be provided for each expense category. If receipts or other forms are provided, or additional help is required to complete the form additional costs will apply. There is no additional cost for a verbal review of the form if you are new to using the form.
- Use our checklist to help you prepare your records!

GST / HST Return

- Calculation of GST / HST Remittance or Refund, based upon completion of Business Income Return(above)
- Includes online filing with CRA

RRSP Planning

- Pre-return preparation the purpose of RRSP planning before RRSP deadline
- Estimated based on the information you can provide at the time
- In person meeting
- Price is per return/person

Complex Medical

- Applies if medical is partially paid by third party insurance. Third party statements required. Maximum time of 1 hour which covers most situations.

Complex Investments

- Applies if annual realized gain / loss statements are not provided and separate sale statements required.
- Excludes options trading.

T1 Adjustment

- For current or prior years, to include missed slips, or changes to tax situation

T1 Adjustment

- For current or prior years, to include complex changes to tax situation. We can confirm in advance if simple or complex depending on individual situation



INCOME TAX PRICELIST SHEET

CRA contact or Notice of Assessment Copy

- Reprint of NOA from CRA website for current or prior years
- Contact CRA via phone for information on your behalf
- Contact CRA website for information on your behalf

Disability Tax Credit Application

- Review of customer circumstances to determine possible eligibility for tax credit
- Assistance in preparation of CRA Tax Credit Application
- Filing with CRA, and copy retention at our office
- CRA follow up
- T1 Adjustments for the years impacted, up to 10 years max

I certify that all information provided on this sheet is provided as complete and accurate as Waterdown Bookkeeping and Accounting will not be auditing for accuracy. I also certify that I have read and understood exactly what is and what is not included in the package I have selected. Should I require additional services not included in my package at a later date, I will be charged separately prior to services being provided.

Signature: _____ Date: _____