

Employee initials:

Deposit date:

Complete deposit:



LIST: DOCUMENTS TO BRING (US)

Name of requestor

Name of partner

Documents to bring

Mandatory

- Last income tax return (**only for new costumers**)
- Check specimen for direct deposit (U.S.A. Bank only)



NEW : We are now "Authorized IRS e-file Provider" !

Income (U.S. residents or green card holders only)

- Copy of your Canadian income tax return
- Income earned in Tax Free Savings Account
- Income earned in Registered Education Savings Plan (including grants)
- Details about disposition of principal residence

Income (All clients)

- Employment income; W2
- Investment income: 1099-DIV, 1099-Int
- Capital gains, 1099-B or a list of all transactions (including purchase and sold date)
- Retirement and social security income 1099-R, SSA-1099
- State / local tax refund 1099-G
- Scholarship
- Employment Insurance (unemployment)
- Welfare; Statement of benefits;
- Self-employed (income & expenses) (Fill **our** questionnaire, **no invoices** please)
- Rental income (income & expenses) (Fill **our** questionnaire, **no invoices** please)
- Income subject to withholding; 1042-S

Deductions

- IRA or ROTH IRA, Official receipts
- Tuition fees
- Student: Interest paid on student loans – Bank account statement
- Medical fees (Total of Invoices, **no invoices** please)
- Charity donation
- Mortgage interest; 1098
- Real estate taxes / school taxes
- Moving fees
- Child care expenses

U.S. citizens, U.S. residents, or green card holders

- US Financial Reporting questionnaire
- TFSA annual statement for each account
- 709 Gift tax - if you gave gifts of more than 14 000\$ to anyone.

Others

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Fees estimation detail

Item	Estimated quantity	Fee before taxes
U.S. income tax – federal – tax master		399.95\$
U.S. income tax – federal – accountant		299.95\$
U.S. income tax – per state		189.95\$
Loyal client discount		- 17.00\$
Discount - no appointment required - subject to the expert's discretion		-37.00\$
Work expenses schedule		134.95\$
Rental income schedule		134.95\$
Business income (self-employment)		134.95\$
Remote management		65.95\$
Express services		Depending on date
Supplement – file deposited after March 14th		12.50\$
Supplement – file deposited after March 31st		25.00\$
Registered mail (by recipient / envelope)		38.50\$
3520-3520A Foreign trust (TFSA and RESP, etc) - price per account		125.00\$
8621 Mutual funds - price per account		20.00\$
Moving fees		79.95\$
FBAR - Foreign Bank Account Reporting - minimum 75\$		
8938 Specified Foreign assets - minimum 100\$+tx		
5471 Shareholder / Administrator foreign company - minimum per company 400\$		
8833 / 8840 Treaty-based position - Closer connection		
Fill our financial questionnaire		
Foreign exchange calculation, Capital Gain or losses, Multiple tax slips		
Foreign tax credit		

Billed per minute

Technician : 2.35\$
 Accountant: 3.60\$
 Tax master : 6.55\$

Conditions

Pricing

I acknowledge and accept the prices above. A deposit could be required. In the eventuality some elements have not been identified at the moment of **evaluation**, I will be contacted to seek my approval for the price.

X

Payment by cash or debit card only.

X

Service without appointment

I understand I will not meet an accountant.

X

I understand the technicians are not trained to give tax information when picking up my return.

X

It is possible to change to the service with appointment, but discount is then lost.

X

Maximum 4 weeks of treatment, unless Express Service is chosen.

X

Treatment delays begin once all documents are received (complete file).

X

Pick-up

Appointment

Service with appointment

I understand I must not bring any missing documents before my appointment. The information will be treated during the meeting.

X

Accountant :