

Dear Clients,

As we prepare for the upcoming tax season, we kindly ask that you follow the updated guidelines below to ensure an efficient and accurate filing process.

1. Family Members' Scans:

Each individual in the household must upload their own tax documents to their respective portals. Children under 18 may be included with the parent, but those over 18 should upload separately. Tuition, medical expenses, and donations for those over 18 should also be submitted under their own profiles—unless they are still dependents.

2. Medical and Donation Receipts:

Please summarize medical expenses using statements from your pharmacy and any other providers. This helps streamline our calculations. Donations should also be summarized.

- Medical: Claimed on the lower income earner (as per your discretion).
- Donations: Claimed on the higher income earner (as per your discretion).
- Subscriptions (e.g., Free Press, Office): Please include these if applicable.

3. Moving Information:

If you moved this tax year, please provide:

- The new and old addresses
- The purchase and sale prices of the old residence
- The dates you lived there

We require this to properly dispose of the principal residence—note: no capital gains apply.

4. Self-Employment:

If you are self-employed, please summarize all relevant expenses (car maintenance, fuel, phone, meals, hydro, water, office supplies, etc.).

5. Employment and Pension Income:

Ensure the following slips are included:

- T4, T4A, T4A(P), T4(OAS), T4RIF
- RRSP, T3's, T5's
- All other tax slips/info
- Bank fees

Please make sure all documents are clear and complete before uploading. If you have any questions, feel free to reach out to us.

Thank you for your cooperation and continued trust.

Warm regards,

Thornton & Co

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