

Date: _____ Name: _____

Do you own foreign assets including investments and income producing properties with a cost that exceeds \$100,000? YES NO
Did you sell any real estate, including either your home or cottage in 2020? YES NO
Did you have a child or add a dependent to your family in the last year? YES NO
Did you move in 2020? YES NO

New address: _____

Did your marital status change in 2020? YES NO

Nature of a date of marital status change: _____

Did you work at home due to covid? YES NO Did you receive CERB/CRB? YES NO

Are you a: Canadian Resident _____ Northern Resident _____ US Citizen _____ (check all that apply)

Did you purchase RRSP's in 2020? YES NO Did you purchase RRSP's in Jan or Feb 2021? YES NO

Did you receive the \$200 Seniors Economic Recovery? YES NO

Phone: _____ Email: _____

Comments/Questions:

This letter sets out the basis upon which we will prepare your personal tax return and supersedes all previous letters to you on this matter. It is understood and agreed that:

1. You will provide us with accurate and complete information necessary to compile such a personal income tax return upon which we will rely. We will not audit, review or otherwise attempt to verify the accuracy of completeness of any information provided.
2. The responsibility for the accuracy of the information and completeness of the representations reflected in the return remains with you. You will indemnify us against any losses we may suffer should the information you provide be inaccurate.
3. Your personal income tax return will include the following statement "Prepared without audit from information supplied by the taxpayer." with our name identified as your tax preparer.
4. If the income tax return contains any business schedules where we compile the figures, we will include with such forms or schedules a "Notice to Reader".
5. It may be necessary for you to file information returns on foreign property you own. There are substantial fines and penalties for non-compliance. It is agreed that you will advise us of any such properties.

Please provide us with copies of any correspondence you receive from Revenue Canada. In many cases, reply deadlines apply, and if not met, proposed assessments or re-assessments may be issued or opportunities to challenge issues may be lost.

When your income tax returns are finished or if we provide any advice on income tax matters, we will send a bill for these services calculated using our normal hourly billing rates. This invoice is due upon receipt. Any amounts outstanding will be charged interest at 1.0% monthly (12.0% per annum). Our liability to you for any claim related to professional services provided pursuant to this engagement, in either contract, negligent misrepresentation or tort, shall be strictly limited to an amount not greater to two times the annual fee paid for the preparation of the return. No claim shall be brought against us in contract or tort more than two years after the services were completed or terminated under this engagement.

We treat information we receive and collect in accordance with the professional standards as confidential, as required by professional standards, and we only disclose or share such information as directed by those standards. We maintain physical, electronic and procedural safeguards to protect those records which professional standards require that we retain. At your request, we will provide advice on tax and other matters. It is agreed that you will not rely on advice given verbally. If such matters are important to you, you will ask us to prepare a formal written opinion, estimate or calculation with a related specification of the reliance you may place on such statements.

The arrangements outlined in this letter will continue in effect from year to year unless changed by either of us. If you have any questions about the contents of this letter, please raise them with us. We appreciate the opportunity of continuing to be of service to you in the preparation of your personal income tax return.

W L Buck & Associates

Chartered Professional Accountants

I hereby accept the terms as written above _____