

2023 Income tax preparation Policies & Procedures including fees

With our even growing client list, time is of the essence in order to ensure that tax returns are filed on time. We feel the need to put some policies in place to ensure the good management of our time. Please carefully read the following and sign to accept these policies.

1. There are only two ways we will accept documents. You may use our NEW secure online portal or bring directly to our office in Knowlton. You may create a secure online portal directly on our website www.blos.ca. It's an easy and safe way to transmit your documents to our office without having to leave your home
-or-
Call or text the office at 450-243-0707 to setup an appointment in person at our office
2. Once our office has received all documents and receipts from you, NO ADDITIONAL documents/receipts/changes will be accepted. We cannot predict or foresee when your income taxes will be prepared so be sure that you have collected everything before giving to our office. If you wish to add/change anything after we receive your file, an additional fee of \$25 will be charged.
3. For clients that choose an online client portal, we will send you the authorization forms for signature and our invoice for payment before filing the returns. A copy of your returns will be uploaded to your portal under the appropriate year.
4. For clients that choose to come in person, you will be notified when to come and pick up your copies and sign the authorization forms. If you choose NOT to come in and pick up your completed tax returns, an additional fee of \$25 will be charged if you require us to email the copies to you.
5. Tax season ends on April 30th. Drop off will officially close on April 25th to allow us to finish up and see remaining clients. Under NO circumstances will we accept tax files after the 25th (unless you are self-employed in which we have to file before June 15th)
6. The office in Knowlton closes on April 30th. We are unable to meet you to pick up documents after this date. If you need to get information on your refund, please contact the government directly. We will provide phone numbers in your tax file. If you require any additional information after April 30th, please send an email to admin@blos.ca
7. Please note that our office will follow your tax file free of charge for the current year until the filing of the next tax year. If you require help/information on a previous year we will be available at an extra fee.

EXTRA FEES that will be charged if necessary (plus taxes)

⇒ Retrieval of online slips	\$2/slip
⇒ Additions/changes after submitting documents to our office	\$25
⇒ Emailing of tax return copies	\$25
⇒ Mailing original documents/receipts back to client	according to Canada Post + \$20
⇒ Tax adjustments after filing current year	\$50
⇒ Follow-up with client on current years filings	Free
⇒ Follow-up with client and/or governments on previous years filings	\$45/hr (1/2hr min. chrg)

Accepted by: _____

Date: _____