



ELECTRONIC DOCUMENT EXCHANGE INSTRUCTIONS FOR CLIENTS

1. A brief video chat will be scheduled with each person filing a tax return to review their tax situation and/or to confirm their identity. The following are acceptable photo identifications.
 - a. Canadian Forces Identity Card
 - b. Canadian Passport
 - c. Certificate of Indian Status Card
 - d. Driver's Licence (Canadian)
 - e. Canadian National Institute for the Blind (CNIB) ID Card
 - f. Firearm Acquisition / Firearm Possession Card (Canadian)
 - g. Permanent Resident Card
 - h. Health Card with Photo (not prohibited)
 - i. Provincial / Territorial Identification Card
2. Please watch the [Document Exchange Video](#) provided by Thomson Reuters. An email will be sent to the address you provide so that you may exchange documents securely with Tarrim Tax. We will also use this account to obtain your electronic signatures required by Canada Revenue Agency. Once you have uploaded your complete tax files, send an email to info@tarrimtax.com.
3. Once your tax return is complete, another video chat will be scheduled to review your taxes. Payment will be required before a tax return can be electronically filed. Payment can be made through our website or over the phone. Your tax return will be sent to CRA electronically immediately and a copy of the electronic transmission will be included with your tax return information along with a receipt for our services.
4. Your tax documents will be secure and will remain on your portal while you are a client of Tarrim Tax Services. You may download a copy of all documents to your home device at any time. This has the added advantage of digitizing your receipts and slips for you. Canada Revenue Agency requires that you maintain a copy (including originals) for at least 7 years.
5. If you also like a hard copy of your information, we can send it to you via Canada Post Registered mail addressed to the family member that contacted us, unless otherwise advised. A single delivery charge of **\$12.50** is added per household and will usually include up to 4 tax returns. In the event you prefer your paperwork returned separately, an additional charge will be applied. Delivery service is typically 2 to 3 business days within Manitoba.

If you have any concerns or questions, please contact Troy Harrison at 204-736-2556 during business hours or email to info@tarrimtax.com .



REQUIRED PAPERWORK FOR TAX CREDITS AND POWER OF ATTORNEY

1. **Eligible Dependent and Spousal Support Payments.** A copy of separation and/or divorce agreement, decree, order, or judgement made by a court or acceptable tribunal. The identity and income of your spouse or common-law partner will be required by CRA for the amount prior to the date of separation for income tax purposes. Only support orders that have spousal support included need to be registered with CRA using for T1158. If the support order is only for child support, you do not need to register it with CRA.
[Eligible Dependents](#) and [Child and Spousal Support](#)
2. Please ensure that a certified copy of Power of Attorney is already on file with CRA for any individual that you wish to file taxes. Please include a copy with your paperwork and it will be returned to you. The POA needs to outline the responsibilities you're able to manage for an individual. Please read the following. [Power of Attorney](#) and [Older Canadian & POA](#)
3. **Employment Insurance Benefits** may be available for individuals caring for a family member. Please visit the following CRA website: [Benefits through EI or your Employer](#)

Disability Tax Credit and Canada Caregiver Amounts

A T2201 Disability Certificate is required be on file with CRA and active (not expired) to claim the disability tax credit for an individual. In addition, you may be eligible for the Canada [Caregiver Amount](#). You may claim this credit If you are caring for child or adult that is dependant on you for support due to a physical or mental impairment. The CRA may ask for a signed statement from a medical practitioner showing when the impairment began and what the duration of the impairment is expected to be.

4. [Child Care Expense](#) receipts are required and generally will be claimed with the lower-income spouse or common-law partner.
5. [Medical Expense](#) receipts are required and may be claimed by either spouse or common-law partner. The claim is based on 3% of your net income. You may also claim expenses for a dependent and/or a person who relies on you for financial support.
6. [Moving Expense](#) receipts are required with specific requirements to make the claim.

For a complete list of credits, please visit the Canada Revenue Agency page [All deductions, credits, and expenses](#) and find out what Canada Revenue Agency will expect.

The initial tax interview will you with a good understanding of the paperwork we will need. A list of slips and receipts can be found on our website under [Tax Appointment Preparation](#).

If you have any concerns or questions, please contact Troy Harrison at 204-736-2556 during business hours or email to info@tarrimtax.com .