



Personal Income Tax Engagement Letter

Thank you for choosing Over the Hill Accounting & Tax Services Inc. for preparing and filing your personal income tax return(s).

This letter summarizes our mutual responsibilities required to file honest and accurate T1 return(s), by the tax filing deadline. The contents of this letter will remain applicable from year to year unless it is changed by you, or us, in writing.

Tax Services

We will prepare your personal income tax return(s) based on the information you provide to us. It is your responsibility to supply us with complete and accurate information in a timely manner. You have the final responsibility for the income tax return(s) and, therefore, you should review it carefully before you approve it for filing.

We do not audit the data you provide to us, although we may ask for clarification for some information. If we receive additional information or slips after we have prepared your T1 and need to make changes to the return, additional charges may be applicable.

If CRA selects your return(s) for review, they can request supporting documentation for a maximum of 6 years past the assessment date, it is your responsibility to keep these documents.

We agree to perform the following tax services:

- Preparation and filing of the Canadian T1 return(s) for the taxation period ending December 31, 2024, including all federal and provincial schedules.
- Preparation and filing of other applicable tax filings, such as, T1135, T2091, T1032, and self employment or rental statements.
- Preparation of the Canadian T1 return(s) for all future tax years going forward until such time as this agreement is changed or terminated.

The law imposes various penalties and interest when taxpayers understate their tax liability, file and or pay late. You are responsible for accurately filling out the attached client checklist to ensure that we have all your updated information, and to ensure that there are no additional schedules that need to be filed on your behalf.



We cannot be responsible for interest and penalties assessed against you in connection with your income tax affairs. You agree that all claims you may have arising from our work shall be regarded as one claim, and that our liability for such shall be limited to no more than \$2,500.00.

Disclosing Confidential Client Information

Our business respects the privacy of information of our clients, and we will not disclose your personal information, unless our clients authorize us to release information, or we are required by law to do so. When we prepare returns for spouses and/or other family members, the person that has engaged us to prepare the T1 Returns will have access to all T1 Returns for the family. Before you provide us with any personal information on behalf of others, you agree that you will have obtained consent for collecting, using and disclosing this information.

Electronic Filing Consent

The CRA requires all tax preparers in Canada to e-file all tax returns on behalf of their clients. Before e-filing a T1 Return, CRA requires us to obtain a signed T183 consent form from you and each of your family members for whom we have prepared a tax return. Please ensure you and any required family members are available to sign the forms so the T1(s) may be filed on time.

Fees for Services

Our invoice will be emailed to you as soon as your tax return(s) are completed, your invoice must be paid before we submit the T1(s) to CRA. We accept Debit, Visa, Mastercard, E-Transfer, cheque or cash. If you have dropped off paper documents and/or requested paper copies of your return(s) please make arrangements to come to the office and pick up your documents.

Over the Hill Accounting and Tax Services Inc.

Serena Hopkins

I agree with the terms of your engagement as the preparer of my (our) tax return(s).

Name: _____

Signature: _____

Date: _____