FLAHR FRIEDEL PROFESSIONAL CORPORATION | CHARTERED PROFESSIONAL ACCOUNTANTS

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Dear Valued Client,

Once again tax time is upon us and we want to make your personal tax experience as convenient as possible. Once you have **all of the documents** required to prepare your personal income tax return, please return the completed forms and information to our office with any other pertinent information **no later than April 18, 2025.**

To help you get organized, we have prepared the 2024 Client Questionnaire and Comprehensive Tax List. You can download these forms on our website at https://www.ffcpa.ca under 'Client Forms' and 'Resources'. On our website, you will also find many forms available to assist you with specific tax schedules such as medical expenses, northern residents, farming statement, business statement, rental statement etc.)

Coordinate Information to Maximize your Benefits – Canada's personal tax system is designed around the family as a unit. Many deductions and tax credits are calculated on the basis of reporting information for a spouse or children in addition to your own. If we are not preparing all tax returns for your whole family unit, we may request information appearing on their tax returns. Proper co-ordination will help ensure that you are maximizing the tax benefits for education, medical, donations, etc.

Direct Deposit – You can sign up for direct deposit or change your account information through many financial institutions, through **My Account**, using MyCRA mobile app or by phone. We are unable to do this on your behalf. Please refer to https://www.canada.ca/en/revenue-agency/services/about-canada-revenue-agency-cra/direct-deposit.html for more information.

Document Retention and Accuracy – Please be aware that **it is your responsibility to maintain all receipts and supporting documentation**. By submitting a summary, you confirm that the information is accurate, complete, and supported by the necessary records. If the CRA requests any verification, you will need to be able to provide these documents.

We do not provide U.S. tax services. Please advise if you are a U.S. citizen or a green card holder and we will refer you to a firm that can assist you.

Please note that slips and receipts often are not completed until the end of February, and for T3s, not until March 31st. **Note, through a matching program of tax information slips, CRA is imposing harsh penalties for unreported income. Please provide us with any late or amended tax slips to avoid exposure to penalties.**

Sincerely,

Flahr Friedel Professional Corporation, Chartered Professional Accountants