1551 Pandora Ave, Victoria, BC, V8R 6P9 Phone: (250) 592-4342 Fax: (250) 592-4386 Email: general@shipleygroup.ca Web: www.shipleygroup.ca

Welcome, New Tax Clients!

This is a list of information we will need from you to complete your tax return:

- O Signed Authorization to Represent a Client form & online confirmation
- o Previous year's Tax Return & Notice of Assessment
- Social Insurance Number
- o Date of Birth
- o Current contact information including: address, phone #, and email
- Marital Status
- o Dependents (if applicable)
- o Completed Business Summary form (if applicable)
- o If you would prefer a paper or electronic copy of the return

Please return the above documents and information to us in one of the following ways:

- o by email to <u>general@shipleygroup.ca</u> (scan your slips and send as pdfs)
- o by dropping off through our mail slot at any time
- o in person by knocking on our door between 12pm and 2pm, Monday-Friday.

Thank you! We look forward to making this tax season easy for you.

Yours truly,

The Staff at the Shipley Group