

TAX SEASON, WE ARE READY...

PHONE: (250) 592-4342

EMAIL: general@shibleygroup.ca

Income Tax Procedures for 2023

STEP 1

- New clients, please email or call us for our short “New Client” checklist.
- All clients, please send us your slips in one of the following ways:
 - By mail or email to general@shibleygroup.ca (scan slips as pdfs)
 - Drop off through our front door mail slot at any time
 - Knock on our door between **12-2pm, Monday-Friday**.
- Note: we do not need last year’s return from returning clients; we have it.
- Phone or email us with any specific instructions or questions.
- Let us know if you would prefer a paper or electronic copy of your return. (Note: all necessary signing can be done electronically, but we will require a separate email address for each individual taxpayer.)

STEP 2

- Once the tax file is reviewed, we will call or email you if we have any questions.
- Once the input and review are complete, we will contact you and provide a package containing:
 - A cover letter with instructions
 - A copy of your tax return
 - All source documents
 - Authorization forms to be signed and returned
 - Payment vouchers (if a balance is owing on your return)
 - A copy of our invoice
- Once you receive and review your return, please sign and return the enclosed **T183 (Authorization to E-File)** along with any other forms requiring your signature.
- If you would like to come into the office to sign forms, pick up source documents, or pay your invoice, please let us know in advance. Note that additional charges will apply if you would like an extra copy of your return printed or would like it mailed to you.
- **Please note that we require both the signed T183 form and payment of our bill in order to E-File your return.** You can send payment by cheque, pay via e-transfer to general@shibleygroup.ca, or phone in a credit card number.
- To review your return with us, please phone or email to book an appointment. You may also use the online booking service found on our website to schedule a time.