TAX SEASON, WE ARE READY…

EMAIL: general@shipleygroup.ca

PHONE: (250) 592-4342

Income Tax Procedures

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 by email to general@shipleygroup.ca (scan slips as pdfs),
  - Drop off your slips through our front door mail slot at any time, or
  - Hand us your slips at 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.

STEP 2

- Once the tax file is reviewed, we will call or email you if we have any questions.
- We will then complete the input and review process.
- Once complete, we will electronically send you:
  - A cover letter containing instructions,
  - A PDF copy of your tax return,
  - A PDF scan of 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).
- If you would like a paper copy of your tax return or 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 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@shipleygroup.ca or phone in a credit card number.
- To review your return with us, please phone or email to book a phone or video appointment.

PLEASE NOTE: Due to COVID-19, we are unable to answer the door when another client is already present in the office. Your patience and understanding is appreciated.