

ACCOUNTING . TAX . ADVISORY

Dear Valued Client,

**Subject: Personal Tax Return Engagement Letter**

It is desirable to have a clear understanding of the terms of my engagement as preparer of your personal tax return(s) for the year 202\_\_\_\_\_.

It is understood and agreed that you have provided me with accurate and complete information necessary to compile such tax return(s). I will prepare your personal tax return(s) using the information provided by you. I will not audit, review or otherwise attempt to verify the accuracy or completeness of any information provided. The responsibility remains with you. If you claim deductions on your return for business entertainment, meals, recreation, travel, gifts or other expenses, it is your responsibility to keep the original receipts and provide details required (amount, date, place, business purpose, business relationship of recipient, etc. ) if requested by CRA.

Your income tax return is subject to review by the taxing authorities. Any items which may be resolved against you by an examining agent are subject to certain rights of appeal. In the event of an income tax review or audit, I will be available, upon request, to represent you. Billing for such additional service is at my standard rate for the nature of services performed. I wish to emphasize that this engagement cannot be relied on to prevent or detect errors or other irregularities in the information provided to me. My professional fees will be based upon time required for each engagement at my standard rates and are due upon receipt.

**Privacy**

It is acknowledged that I will have access to all personal information in your custody that I require to complete my engagement. My services are provided on the basis that:

- you represent to me, that before I access such personal information, you will have obtained any required consents for collection, use and disclosure to me of personal information required under applicable privacy legislation (i.e.. from spouse or dependents); and
- I will collect from you and use, disclose and retain all such personal information in compliance with my privacy statement, which is available upon request from my office.
- I may from time to time, and depending on circumstances, use third-party service providers to assist in completing the agreed-upon Services, including but not limited to the use of certain technology platforms. In that regard, I may share confidential information with the service providers. You hereby authorize my Firm to disclose confidential information of yourself to such service providers retained by my Firm.

Sincerely,

**Numbers Plus**

I, \_\_\_\_\_, agree with your understanding of the terms of your engagement as preparer of my personal tax return(s) as set out in this letter.

\_\_\_\_\_  
Signature (Taxpayer)

\_\_\_\_\_  
(yyyy-mm-dd)