



To our valued client,

With personal tax season fast approaching we continue to offer a convenient, secure online document sharing and digital signature options for our clients using our online portal system. In order to reduce our environmental impact, we have updated our Personal Tax Reminder Checklist to a fillable format which is available on our website under our resource section. (Check out our other resource material available <https://www.clarkrobinson.com/>)

We recommend that you use our portal to digitally provide any documents or forms, as email is not a secure means of sending confidential or sensitive information. Forwarding documents by drop off or regular mail are also acceptable means of delivery.

Please complete the reminder checklist in full and return it back to us. Filling out this checklist will greatly assist us in completing your return efficiently and accurately.

If you have questions, have not signed up for the portal, or need assistance regaining access, please contact our office. Please note for DocuSign purposes and portal registration we require a separate email address for each taxpayer.

To help us complete your return before the April 30th deadline, please provide your information to us, along with a completed copy of the reminder checklist, as soon as possible but no later than April 15th.

Due to inflation and increase in overhead costs, our total fees for personal tax preparation may increase. We are confident that our fees are competitive with other professional accounting firms within the marketplace.

Please also note the following reminders that may affect your personal taxes:

- Canada Revenue Agency continues to assess penalties when income slips are omitted on filing, if more than one omission occurs within 3 years. If you receive additional slips, please provide them to us immediately.
- If you are a U.S. citizen, you may have IRS filing requirements that you are unaware of. If you are a Canadian citizen, but spend more than 120 days in the U.S. in a year, you may also be subject to certain U.S. reporting

Please contact us if you have any questions. We look forward to receiving your information and preparing your personal tax return. **We appreciate your ongoing business.**

Yours very truly,

Clark, Robinson
Chartered Professional Accountants
Enclosures