



SANDRA SCHOFIELD
Chartered Professional Accountant

601 Liverpool Road
Pickering, Ontario L1W 1R1
Telephone: 905-831-5335
Fax: 905-831-8778
www.schofieldcpa.ca

Welcome to the 2022 Tax Season!

As we complete the second year of Covid shutdowns and protocols, we hope that you are keeping yourself and your loved ones safe. As we end the current lockdown and the vaccines start doing their work, we hopefully see the light at the end of the tunnel. In some ways, it's hard to believe a new year has begun and that tax season is upon us once again.

APPOINTMENTS AND DROP-OFF OPTIONS

We have decided to continue to keep our office closed to help us stay healthy and continue to serve you and process your returns as quickly as we can. Returning clients with no significant changes to their tax situation do not require an appointment. If you are a new client or your situation has changed, please call our office to set up an appointment over the phone or by zoom. I will be available for appointments Wednesdays from 1pm to 6pm, and Saturdays 9am to noon. The last day for appointments before the April 30th deadline is Saturday, April 9th.

We encourage all clients to provide tax documents and completed documents electronically. These can be uploaded via secure email (e-courier) or provided via flash drive. While we are happy to assist you as we move to a paperless firm, electronic transmission is not required, and we understand sometimes it's easier to continue to provide paper documents. Paper documents and completed checklists can be sent via courier or mail, or they can be left at our office in one of our secure drop boxes (located at both the front and back of the office). As we intend to continue to work from the office this tax season, you can always tap on the window and give a wave when you drop off.

- **Engagement Letters** outlining the terms under which we prepare your return are required each year and can be signed electronically.
- **Client Tax Organizers** provide us with the information to prepare your tax return(s). The organizer is available in a fillable format. Alternatively, these items can be downloaded, completed by hand, scanned and sent via e-courier, mail, courier, or dropped off to us. Please remember, we are flexible!
- To proceed with preparing your tax return(s), please provide a completed checklist per couple and a signed engagement letter for each person requiring a tax return, along with all relevant documentation. Also, please be sure to include any updates to your address, telephone number, email, and bank information (for direct deposit). If you are acting on behalf of someone else, please include appropriate documentation providing consent if you have not already done so.
- While you may still receive some documents in early April, it would be appreciated if you could submit all available information no later than **March 25th**. Staff will organize and review your documentation before I prepare & finalize your return. Please be prepared for emails or phone calls from my team with any additional questions or information we might need from you to complete your return.
- There is no need to make an appointment to drop off your return during business hours or at any time to either of our secure lockboxes; they are checked frequently.

- **Completed tax returns** - We will send you your results and electronic signature instructions when your tax returns are complete. We will also email you an invoice that can be paid directly online.
- We will electronically file all tax returns (except in limited circumstances). Still, we cannot do so without signed consent indicating that you have reviewed and agreed to all the information in your tax returns. Please ensure that your signed authorization is returned as soon as possible after reviewing your return. Also, a reminder that we require payment of our fees when you pick up your return from our office.
- In addition to reducing the environmental impact and many clients telling us that paper copies are no longer needed, we are asking clients to let us know in advance if they would rather a full pdf copy of the tax return to be sent via e-courier. Any original documents you sent to us will be returned by Canada Post or curbside pickup.

COVID-19 IMPACT ON OUR FIRM

Like many of you, we've been faced with tough choices this year. We've worked around the clock with COVID-19 benefits and tax changes requiring continuing education and updates. Unfortunately, while we'd like to remain optimistic, our expectations are stoic. We work on a first-come, first-serve basis and anticipate many of our clients will have more complex tax situations due to employment changes, business downturns, economic assistance, and other major life events. In light of these factors outside our control, we cannot promise turn-around times this tax season. We appreciate your understanding and continued flexibility as we all continue to navigate through these ongoing uncertainties.

If you have any questions, please don't hesitate to contact us by email at admin@schofieldcpa.ca or telephone at 905-831-5335. We look forward to assisting you with your tax return.

Sincerely,

Sandy Schofield

Sandy Schofield, CPA, CMA

P.S. We have always appreciated your confidence by referring your friends and family to our firm. If you or someone you know needs our "Client Tax Package," it is available on our website www.schofieldcpa.ca