Sandra Schofield CPA
Professional Corporation

Welcome to the 2023 Tax Season!

Tax season is officially here, and we look forward to working with you in the coming year. We are also pleased to announce that on July 1, 2022, Sandra Schofield CPA changed its name to Sandra Schofield CPA Professional Corporation. This is a result of a change in our business structure, and while we are slightly changing our name, we want to stress that our services, support and commitment to you, our customers, remain unchanged.

To improve your experience, our firm is evolving to provide more proactive tax advice to help you save more taxes and optimize your situation. Based on feedback from many of our clients, we are improving our service offerings for the upcoming tax season. We will now offer three different **tax packages** for you to choose from; please see the attached brochure.

While you may note that our prices have increased, these new options will provide significantly more value and a better return on your investment with these service levels.

An Important note:

Due to the demand for our tax services, we have a limited number of places available this tax season for returns to be completed by the May 1st deadline. To reserve your spot, please respond no later than March 3, 2023, indicating which **tax package** option you'd prefer. We regret that responses received after that date won't be guaranteed to be filed before the tax deadline date of May 1st.

If you don't plan on selecting an option or have any questions, please don't hesitate to let us know.

<u>APPOINTMENTS AND DROP-OFF OPTIONS</u>

Our office has re-opened in-person service, but numbers will be limited, and **<u>masks are mandatory</u>**.

Returning clients with no significant changes to their tax situation do not require an appointment. If you are a new client or need to discuss specific matters and require an appointment, please call our office to set up an appointment. I will be available for in-office appointments Wednesdays from 1 pm to 6pm and Saturdays from 9 am to noon; phone appointment availability will depend on timing. The last day I will be taking appointments before the May 1st deadline is Saturday, April 1st.

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. We are happy to assist you individually as we move to a paperless firm; however, electronic transmission is not required, and we understand that sometimes it's easier to continue to provide paper documents. Paper documents and completed checklists can be sent via courier or mail or dropped off at our office via one of our drop boxes (located at the front and back of the office).

ADDITIONAL POINTS

- **Engagement Letters** which outline the terms under which we prepare your personal return, are required each year and can be signed electronically.
- **Authorize a Representative** forms which allow us to represent you with CRA will need to be signed and can also 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 printed at home, completed by hand, scanned and sent via e-courier, mail, courier, or dropped off to us. Please remember that we are flexible!
- To proceed with preparing your tax return(s), please provide a completed checklist **(one per couple)** and a signed engagement letter for each person requiring a tax return, along with all relevant documentation. Also, please 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 24th**. 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, this is a reminder that we require payment of our fees when you pick up your return from our office.
- In addition to the environmental impact and many clients telling us that paper copies are no longer wanted, we ask clients to let us know in advance if they would rather a full pdf copy of the tax return be sent via e-courier. Any original documents you send to us will be returned by Canada Post or curbside pickup.

If you have any questions, please don't hesitate to contact us by email at admin@schofieldcpa.ca or by 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 in 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