



Dear Valued Client,

Subject: Personal Tax Return Engagement Letter

It is desirable to have a clear understanding of the terms of our engagement as preparers of your personal tax return(s) for the year 202____.

It is understood and agreed that you have provided us with accurate and complete information necessary to compile such tax return(s). We will prepare your personal tax return(s) using the information provided by you. We 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 personal tax return(s) will be stamped with the following communication: **Prepared without audit from information supplied by the taxpayer.** This communication will appear with the name **Numbers Plus Professional Corporation** as your personal tax return preparers.

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, we will be available, upon request, to represent you. Billing for such additional service is at our standard rate for the nature of services performed. We wish to emphasize that this engagement cannot be relied on to prevent or detect errors or other irregularities in the information provided to us. Our professional fees will be based upon time required for each engagement at our standard rates and are due upon receipt.

Privacy

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

- you represent to us, that before we access such personal information, you will have obtained any required consents for collection, use and disclosure to us of personal information required under applicable privacy legislation (i.e.. from spouse or dependants); and
- we will collect from you and use, disclose and retain all such personal information in compliance with our privacy statement, which is available upon request from our office.

Sincerely,

Numbers Plus

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

Signature (no printing)

(yyyy-mm-dd)