



# 2017 Personal Income Tax Return Checklist

*Thank you for the opportunity to prepare tax return(s) for:*



**ENGAGEMENT LETTER AND AUTHORIZATION:**

As your personal income tax preparers, we are required to observe due care in preparing income tax returns. The tax returns are based on information provided solely by you, and we must prepare your returns in accordance with applicable tax laws. We will use our judgment to resolve questions in your favour where the law is unclear. We will not audit or otherwise verify the data you submit other than to clarify questions which may arise as a result of our preparation services.

**By signing below, you are authorizing us to:**

- complete the 2017 tax returns for the individuals named above.
- render such accounting and bookkeeping assistance as necessary to complete the returns.
- e-File your return (unless you specify otherwise).
- email you as a means to gather information and discuss your return with you.
- obtain information directly from CRA as necessary.

**In addition, you agree to do the following:**

- complete the checklist and submit required documentation in a timely fashion.
- review carefully and completely your tax returns before signing off.
- pay our fees, plus HST.
- arrange with our office to review the returns, to sign all required forms and authorizations, to obtain pdf copies of your tax returns and documents, and to pay our fees in full, **before** your tax returns can be e-Filed.

Any significant follow up of your returns, including error correction (unless it results from our error), or status inquiries will be billed separately; however, a minimum fee of \$75 plus HST will apply.

***On behalf of the above named taxpayers, I hereby agree to the terms and conditions set out above:***

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Please proceed to the checklist. If you have any questions or need any assistance completing this form, please call Susan at (613) 435-7690 ext. 221 or email [susan@stellarmanagement.ca](mailto:susan@stellarmanagement.ca).