

March 2024

2023 T1 ENGAGEMENT LETTER

We appreciate the opportunity to provide taxation services to you with respect to your 2023 personal income taxes (T1 Form). This letter is to set out a clear understanding of your responsibilities as the taxpayer and the nature of Rutwind Brar LLP's involvement as the preparer of the requested income tax returns.

It is understood and agreed that:

1. You will provide us with accurate and complete information necessary to compile your personal income tax return and as such, we will be relying solely upon such information to prepare the return. This also includes information such as:
 - a. Your U.S. citizenship or green card status, if applicable.
 - b. Your interest in foreign properties with an aggregate cost in excess of \$100,000 at any time of the year, as well as all income from foreign properties regardless of their aggregate value for purposes of filing Form T1135, T1134, T1141, and T1142 as applicable
 - c. Your disposition of property, even principal residence property, including accurate information used to determine the property values and original cost bases.
2. We will make no audit or other verification of the data you submit, although we may need to ask you for clarification of some of the information.
3. Any amended returns required due to missed slips or inaccurate information originally given to us will be charged out at our regular billing rates.
4. You should retain all the documents, cancelled cheques, and other data that form the basis of your income and deductions, in case of future audits by the tax authorities. We do not keep photocopies of all documentation provided to us.
5. As you are responsible for your personal income tax return, it is necessary for you to review and sign your return prior to filing.
6. Both parties recognize and accept the security risks associated with email communications.
7. Our fee for all the above services will be based upon the amount of time required at our standard billing rates, plus out-of-pocket expenses. All invoices are due and payable upon presentation. Returns will be filed once full payment has been received and the returns have been reviewed and signed by the taxpayers. If your personal income tax return is selected for audit or review, the fee for assistance in this matter would be in addition to the preparation of your return.

ACKNOWLEDGEMENT AND AGREEMENT

If the foregoing fairly sets forth your understanding, please sign this letter in the space indicated and return it to our office. The arrangements outlined in this letter will continue in effect unless changed by us.

Yours truly,

Rutwind Brar LLP

Accepted By (signature): _____ **Date:** _____

Accepted By (Spouse's signature): _____ **Date:** _____

Other family members for whom this letter applies: _____
