



*owner - Evelyn J. Andrews-Greene Ltd.

January 2, 2023

Welcome to New Year 2023! I hope your December was peaceful and rejuvenating, and let's look forward to 2023 with optimism!

I would like to help you ensure your Canadian Personal Income Tax Return filing responsibilities are as pleasant and cost-effective-to-you as possible this spring. Below, I have highlighted some very important items to keep in mind, and on the reverse is my 2022 Personal Income Tax Return Checklist to assist you in this process – including my “Tips to help YOU minimize your professional fees”.

IF you had a complex financial situation in 2022 (such as listed below), please send me a BRIEF email (egreene@andrewsgreene.bc.ca) right away to either (a) obtain my guidance as to what you need to accumulate or (b) schedule your January 2023 in-person consultation with me. This helps YOU ensure the most overall cost-effective-to-YOU professional process:) Complex or new financial issues include the following:

- . sold (or changed use of) a real estate property or sold your business in 2022;
- . started operating a business in 2022 or begun renting a part of your real estate property; and/ or
- . held significant non-registered financial investments during 2022.

(Please note: I have NO consultations available during February-April personal tax season, as I must temporarily focus exclusively on tax return compilations. Also, basic business bookkeeping services are available at Andrews-Greene CPA fall 2022 to January 2023.)

Benefits of Filing Early – Filing your 2022 Personal Income Tax Return early gives YOU significant benefits, generally including reduced audit exposure and increased goodwill with Canada Revenue Agency. Also, you'll be ahead of the rush in accessing your bookkeeper and your investment adviser for your 2022 calendar year's business and investment summaries, so lower overall professional cost and less stress to you. Plus, you will receive any tax refund and/ or social program benefits much earlier. Win-win!

Fees and Discounts – Andrews-Greene CPA's personal income tax return compilation fees are unchanged for many years!! And, there are several excellent ways for you to minimize your overall professional fees, per my “tips” section on reverse. As usual, I offer a 10% Early Bird Discount if – before Saturday March 4, 2023 - you accumulate ALL your 2022 personal tax T slips/ summaries/ etc in hardcopy/ print format (see reverse checklist as guide), put everything in ONE envelope and drop off all-at-one-time at my Andrews-Greene CPA's street level 711 A Broughton Street exterior door mail slot.

My Professional Commitment to you: I pride myself on proving excellence in customer-oriented, quality professional income tax services – specific to your unique situation. Current year's income tax returns are compiled on a First-all-info-in, First-done basis, and I'm generally able to turnaround within two weeks from the date I receive ALL materials. Please remember that 2022 personal income tax materials received after Saturday April 15, 2023 are only accepted on a “I'll do my best but no guaranteed completion by April 30th” basis.

I look forward to seeing your 2022 personal tax assignment this spring!

Kindest regards,

A handwritten signature in cursive script, appearing to read "Evelyn".

Evelyn J Andrews-Greene CPA CA

Andrews-Greene Chartered Professional Accountant
Personal Canadian Income Tax Checklist – 2021 Calendar year
“Helping YOU Turn YOUR Dreams Into Reality” ... www.andrewsgreene.bc.ca

Tips to Help YOU Minimize YOUR Professional Fees

- **Schedule an tax/financial/business planning consultation each summer/ fall with Evelyn** IF you have/had a complex tax year (eg sale of real estate property or business, significant non-registered capital gains/ losses investment incomes, start business or rental)
- **Make arrangements, in early January 2023, with your bookkeeper** (to quickly complete your 2021 Income and Expenses proprietorship business summary) **and/ or with your investment adviser** (to quickly complete your 2021 Summary of Realized Investment Incomes, including cost/ ACB of all investment sales) *Basic bookkeeping services available at Andrews-Greene in January*
- **Bring in everything in to me – in print/ hard copy format and in ONE package – ASAP**
 - Your full name and your CURRENT full home mailing address
 - Your current email address, home phone # and personal cell #
 - If you live with another adult (married/ common law): your partner's name and net income
 - Each dependent: full name, birth date, SIN #, and dependent's net income
 - IF Tuition/ Education Tax Credits, please have been also complete dependent's tax return
 - ALL of your T slips (don't separate copies) and required receipts listed in LEFT column below
 - ALL of your 2021 calendar year incomes (and official deduction receipts), including:

T-Slips & Official CRA-required Receipts, such as

- * T slips (T4,T4A,T5,T3, etc) (do not separate copies)
- * *Official* RRSP Contribution receipts
- RRSP withdrawal slips (T4RSP)
- Registered Charity Receipts
- Professional/ union dues
- T2202 Tuition & Education Tax Credit
- Political donation receipts
- * Medical expenses – your Detailed Jan 1 – Dec 31, 2021 Private Health Reimbursement Summary, and for others tape your proof of payment to medical invoice)
- *All covid government financial supports received in 2021

ALL of your 2021 Incomes - World Wide, including:

- * Employment income including all tips, gratuities, etc
- * Investment & pension incomes (inc. Your 2021 “realized” gains/ losses on investments with proceeds, costs, fees)
- * Disposition/ change of use of real estate (inc. Principle residence) or business (inc. Lawyer's statement of adjustments, selling price and purchase)
- * Unincorporated business: total income earned, total GST collected, and “Common Business Expense” by category at 100%
- * Rental income and rental expenses, by property (interest, insurance, property taxes paid, advertising, property managements, list all repairs separately, etc)

Other 2021 Important Info

- * List of ALL of your real estate property(ies) AND financial investments *outside Canada* inc. Purchase cost, current market value, country (There's significant CRA penalty non-reporting)Official
- * Child and spousal support paid or received in 2021
- * Childcare receipts (by caregiver name, total amount paid, SIN # if an individual)
- * Tax installments paid
- * Moving expenses: list of receipts, original address, date of move, new address, distance to new)