



Ritchie Shortt & Tully LLP

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Dear Client:

It's that time of year again! Please [click here](#) for our updated personal income tax questionnaire, which may assist you in gathering all relevant information we require to complete your income tax return. **Please complete the questionnaire and return it to us with your tax information.** We will require responses to these questions to prepare the tax return. The checklist attached will also serve as a great tool to ensure you are benefiting from any potential tax credits that may apply to you in 2025. The checklist is not meant to cover every possible tax situation, please make us aware of any major changes that occurred during the year in your life. [Click here](#) for our T1 Engagement Letter under the Forms section. Please review and sign the letter and return it to us.

If you have self-employment income or rental income, we urge you to visit our website www.rstaccountants.com and use the forms or excel templates to summarize your information (see the Resources tab – Forms or Calculation Tools). Be sure to read the instructions on the first tab of the excel worksheets. If you prepare your summary electronically, please email it to us or upload it to our secure portal. **We encourage the use of our secure portal for exchanging information electronically.**

Our office hours are Monday to Friday from 9:00 am to 5:00 pm. During the month of April, we will also be open on Saturdays from 10:00 am to 2:00 pm. For your convenience in dropping off information after office hours, there is a client drop mail slot available on the northernmost door at the back of our building. (First door on the left if you are facing the building from our parking lot). We have an automated telephone system, so please take note of the person's name and extension if you are contacted by one of our staff.

We understand that several items may not be available to you until late March. However, we kindly request that you bring your tax information that you do have to the office, **no later than April 9, 2026**. If your information has not been submitted to us by April 9, 2026, we cannot guarantee completion by April 30, 2026, as returns will be completed on a first-come, first-served basis. Please ensure that you provide us with all slips reporting any source of income. Failure to report income will result in penalties.

IMPORTANT - If you don't already have online access, we encourage you to register for "My Account" access with CRA and add your email address to your account.

Thank you for your co-operation and we look forward to seeing you soon.

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