



## IT'S PERSONAL TAX TIME - 2022!

Please call 403-568-4341

### Basic Rate

\$190.00 per return plus \$8.00 per slip

### “Complex” Rate

*Based on hourly rates:*

*i.e. proprietorship, rental income, investment, etc.*

**Each return must have the following forms signed:**

- 1) Information Request Form**
- 2) Engagement letter**
- 3) T1013 Consent, if applicable**

Returns cannot be filed until **full payment of the invoice is received and the T183 form has been signed** (as required by Canada Revenue Agency)

Returns are queued and processed as received.

Appointments are not booked for personal tax returns. \*

*\*A charge may apply if you request an appointment.*



Chartered Professional Accountant  
Suite 120, 3225 12 Street NE  
Calgary, AB T2E 7S9  
Tel: 403-568-4341  
Fax: 403-568-4381  
Email: [info@misura.ca](mailto:info@misura.ca)

**Misura Berteit & Associates Professional Corporation is not liable in the event of missing or incorrect information.**

## **PERSONAL TAX CHECKLIST!**

It's that time of year again and to prepare your personal tax return please forward the following information, where applicable, to our office:

- All T-slips (T4's, T3's, T5's, etc.)
- T2200 and/or number of days working at home for 2022
- Tip information if applicable
- Child Care Expenses
- RRSP contribution slips
- Medical receipts, including private health care premiums
- Donation slips
- Business/proprietorship income (please refer to our business checklist)
- Investment income (broker statements, cost and sale information)
- Real estate inc. principal residence (sale documents, details of purchase)
- Moving expenses (please refer to our moving checklist)
- Tuition receipts
- Commission income; a signed T2200 (please refer to our employment checklist)
- Union or association dues
- Rental income (please refer to our rental checklist)
- Taxable alimony support received and paid
- All additional information deemed to be relevant

Should you have any questions, do not hesitate to contact us at (403) 568-4341 or via email at [info@misura.ca](mailto:info@misura.ca). Otherwise, please feel free to drop off your information with our administrators or call to be signed up to our secure client portal, during our normal business hours of 8:30 a.m. to 4:30 p.m., Monday through Friday (excluding holidays).

~~~Sending information through email is not secure and not recommended~~~

**\*\*For your convenience, we will be offering extended hours through the month of April. Starting on Tuesday, April 4, 2023, we will be open on Tuesday's and Thursday's from 830am to 6pm. \*\***

**PLEASE NOTE: We will guarantee that Tax Returns will be filed by the April 30 due date, if ALL required information has been provided to us by no later than FRIDAY, APRIL 14, 2023.**

**WE CAUTION, TAX RETURNS THAT ARE RECEIVED TO US AFTER APRIL 24, 2022 WILL MOST LIKELY NOT BE FILED ON TIME.**

**MISURA BERTEIT & ASSOCIATES PROFESSIONAL CORPORATION**



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## Personal Tax Engagement - 2022

### Dear Client,

You have engaged Misura Berteit & Associates Professional Corporation (MB&A) to prepare your individual T1 income tax return. The purpose of this letter is to set out a clear understanding of the nature of our involvement as the preparer of your personal income tax return and your responsibilities as the taxpayer.

MB&A will prepare the return based solely on information provided by you. We will not audit, review or otherwise verify the accuracy of this information. While we will review the completed return with you, it is your responsibility under the *Income Tax Act* to ensure the accuracy and completeness of the information therein.

You may use our office address as the mailing address for the CRA with respect to assessments and queries. We will forward to you copies of any communication received with recommendations for the disposition of matters requiring response.

If you choose to use your own address as the mailing address, we recommend that you provide us immediately with any correspondence you receive from the CRA. Please note that in many cases reply deadlines apply, and if not met, proposed assessments or re-assessments may be issued or opportunities to challenge issues may be lost.

Please let us know your preference at the time you deliver the information for preparation of your return so that we may indicate your choice when preparing your tax return.

Your personal income tax return will include the following statement: "Prepared without audit or review from information provided by the taxpayer", along with our firm name identified as the preparer of your tax return.

You acknowledge that we will have access to all personal information that is required to complete our engagement. Our services are provided on the basis that:

- You represent to us that you have obtained any required consent for the collection, use, and disclosure to us of personal information required under applicable privacy legislation; and we will retain all personal information in compliance with our Privacy Code.
- Our fees are based on the complexity of your return and are payable upon delivery of the completed return to you. These fees are for the preparation of the return only and any services required further to this return, such as discussions or correspondence with, or an audit by, the Canada Revenue Agency, will be billed separately and as arranged with you at that time.



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These arrangements will remain in effect from year to year unless revised in writing. This agreement shall be governed by the laws of the Province of Alberta.

Either party may terminate this engagement without cause upon thirty (30) days' notice in writing. On termination by either party under this paragraph, the client shall forthwith pay us fees for the services performed, including all expenses and other charges incurred by us for this engagement.

If either party breaches this engagement, the non-defaulting party may terminate this engagement after giving seven (7) days' notice to remedy the breach. On termination by ourselves under this paragraph, the client shall forthwith pay us fees for the services performed to the date of termination, including all expenses and other charges for this engagement.

If these terms are acceptable, please acknowledge by signing this letter where indicated and return it to Misura Berteit & Associates.

Sincerely,

*Misura Berteit & Associates Professional Corporation*

**MISURA BERTEIT & ASSOCIATES PROFESSIONAL CORPORATION**

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*The services set out in the foregoing letter are in accordance with my requirements. The terms set out are acceptable to me and are hereby agreed to:*

X

\_\_\_\_\_  
Signature

X

\_\_\_\_\_  
Please print name

X

\_\_\_\_\_  
Date



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## It's Tax Time Again!

The Chartered Professional Accountants Association of Alberta recommends this checklist be completed every year **prior** to commencing the preparation of your tax return. **Please complete** and return to our office with your tax information. If you own a business, have rental properties, claim employment expenses or have moved during the year. Please complete the appropriate checklist, which can be downloaded from our website at [www.misura.ca](http://www.misura.ca). Call if you have any questions, we are here to help!

### **\*\*Mandatory Canada Revenue Agency Questions\*\***

Do you own any assets outside of Canada at any time during the year with a cost in excess of \$100,000 (Canada)  Yes  No

Did you sell a house throughout the 2022 or 2023 year (including principal residence?)  Yes  No

Did you move out of your home in 2022 or 2023 and start renting it out or move back into a former rental property?  Yes  No

Do you or your spouse (if applicable) have TFSA?  Yes  No

Authorization for elections Canada? (For voting purposes)  Yes  No

\*\*\*For those not already registered\*\*\*

Authorization for the registration of CRA online mail- "My Account"?  Yes  No  
(Choosing to allow CRA to send correspondence through "My Account" email vs mail.)

If requested at a later date, do you give Misura Berteit permission to email you a PDF copy of your entire personal tax return?  Yes  No

Please Check Personal Tax Package Preference  PDF  Paper Copy

Do you give permission to Misura Berteit to subscribe to our monthly/yearly newsletter to receive helpful tips, tax information and updates to office hours?  Yes  No

Email Address: \_\_\_\_\_

Mobile Number: \_\_\_\_\_



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**Is the Personal Information the same as the prior year?** Yes  No

**IF YES – PLEASE GO TO THE BOTTOM OF PAGE 3 AND SIGN**

Mr  Ms  Miss  Mrs

Taxation Year: \_\_\_\_\_

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

Postal Code: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

S.I.N: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Province of residence as of December 31? \_\_\_\_\_

Do you have Canadian citizenship? Yes  No

Do you have foreign citizenship or are a green card holder?  Yes  No

If yes, what country? \_\_\_\_\_

Became or ceased to be a resident of Canada during the year? Yes  No

If yes, what date? \_\_\_\_\_

Marital Status on December 31? Married  Widowed  Common-law   
Single  Separated  Divorced

**If Married or with a Common-Law, please complete:**

Spouse First Name: \_\_\_\_\_ Spouse Last Name: \_\_\_\_\_

Spouse Date of Birth: \_\_\_\_\_ Spouse S.I.N: \_\_\_\_\_

Spouse net income, line 23600, for taxation year \$ \_\_\_\_\_

Did your marital status change during the year? Yes  No

If yes, date of change? \_\_\_\_\_

Do you pay or receive any spousal support payments? Receive  Pay

If so what is the amount per month? \$ \_\_\_\_\_

If you pay: Recipients Name: \_\_\_\_\_

S.I.N: \_\_\_\_\_



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Dependent Information:

| First Name | Last Name | Date of Birth | Relationship | S.I.N | Net Income |
|------------|-----------|---------------|--------------|-------|------------|
|            |           |               |              |       |            |
|            |           |               |              |       |            |
|            |           |               |              |       |            |

Anyone with Permanent Disability? Yes  No

Has T2201 (Disability Tax Credit Certificate) been filed? Yes  No

Additional Information: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I have disclosed all sources of income earned this year for preparation of this tax return.**

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

**\*\*All mandatory annual questions MUST be completed, to complete your personal taxes. As it is always our policy, all taxation returns will NOT be filed until payment has been made in full. \*\***

**Misura Berteit & Associates Professional Corporation is not responsible for missing or inaccurate information.**