



Truong Tax and Accounting Services Ltd.

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Personal Tax Digital Filing Procedures

1. You are going to either email or upload your digital (scanned) documents to Dropbox. Please download and complete the 2024 Personal Income Tax Checklist from my website at <http://www.truongaccounting.ca/resources/>. The checklist will help you gather and organize your tax documents.

For new client, I require your prior year 2023 personal income tax return.

2. After I received your documents, I will email you form AuthRep (For new client) for you to sign and email back to me.

The Canada Revenue Agency (CRA) requires that a taxpayer signs form AuthRep Authorizing/Cancelling a Representative before a preparer can communicate with CRA on your behalf.

Note for new client: before I can proceed with your tax preparation, I must have your signed AuthRep form and prior year 2023 personal income tax return.

3. After I received all your documents (Tax documents, prior year 2023 personal income tax return, and signed AuthRep form). I will prepare your tax return and email you tax summary for you to review. I will email you T183 EFILE authorization form for you to sign and email back to me.

The CRA requires that a taxpayer signs form T183 Information Return for Electronic Filing of an Individual's Income Tax and Benefit Return before a preparer can electronically file tax return on your behalf.

I also email you the invoice which is paid upon receipt via e-transfer before I can e-file your tax return.

4. After I received your signed T183 form and the invoice is paid via e-transfer, I will e-file your tax return and you can download a digital copy of your tax return with summary cover letter for your records.