

# American Expat Tax Services (AET)

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**American Expat Tax Services (AET) is a specialized team of cross border tax specialists with extensive knowledge and years of experience in complex tax situations arising from tax obligations on both sides of the US/Canada border.**

We offer comprehensive tax preparation services including:

- ✧ Foreign Tax Credits
- ✧ Foreign Earned Income Exclusion
- ✧ Foreign Trust reporting required for your RESP's and TFSA's
- ✧ Special US reporting in regards to Passive Foreign Investment Companies (non-US Mutual Funds, ETFs, etc. – Form 8621)
- ✧ Claiming Tax Treaty benefits
- ✧ Compliance initiatives (IRS's Streamlined Procedures/Offshore Voluntary Disclosure Program; CRA's Voluntary Disclosures Program)

**Contact AET today to set up an appointment with an AET specialist to help guide you through your complex tax situation.**

Meeting your expectations:

- ✧ Up Front Pricing – no surprises
- ✧ Safe and Secure sharing of documents and information through your own online portal, encrypted email or secure drop box on our website.
- ✧ Secure payment methods – On-line, E-transfer and all major credit cards accepted
- ✧ Option to E-file your return (if eligible)
- ✧ Year Round Service
- ✧ Audit Assistance

## **Contact Us**

### **[MAKE AN APPOINTMENT](#)**

PH: 1-888-243-9992

[info@amexpattax.com](mailto:info@amexpattax.com)

Fax: 1-888-958-2367

[www.amexpattax.com](http://www.amexpattax.com)

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✦ Using American Expat Tax Services (AET) is **easy, convenient and secure**.

## NEED TAX PREPARATION SERVICES?

1. [Book an appointment](#) - Tell us who you are, where you are located and a little about your situation. Intake appointments are **no cost / no obligation** phone consultations with an AET Specialist.
2. Attend your scheduled intake appointment – Call the international, toll-free number that you will be provided upon scheduling your appointment. During the call, the AET Specialist will gain clarity on your personal tax situation by asking you various questions about your situation.
3. Review your engagement package – Following your intake appointment, AET will invite you to register for a secure online portal. We will upload to that portal an engagement package (complete with the terms of our service, privacy policy, detailed price quote and checklist of items we require to complete the engagement).
4. Engage our services – Follow the instructions provided on the cover page of your personalized engagement package so AET can begin work.

## NEED QUESTIONS ANSWERED?

1. [Book an appointment](#) - Tell us who you are, where you are located and a little about your situation. 30 minute consultation appointments are available at your convenience. Applicable rates are posted on our scheduling page.
2. [Make your payment](#) – All consultations require payment prior to the scheduled appointment.
3. Attend your scheduled consultation appointment – Call the international, toll-free number that you will be provided upon scheduling your appointment. During the call, the AET Specialist will gain clarity on your personal tax situation and answer any questions or concerns you have.

**There are never any surprises with our fees.** Fees are quoted prior to the commencement of any work or the scheduling of any appointment. We require a down payment, equal to 50% of the amount quoted in an engagement package prior to beginning the work, and the balance on completion. Payment in full is required prior to any consultation appointment.

**Your privacy is important to us.** Protection of your privacy and personal information is a top priority at American Expat Tax Services. We will provide you with an encrypted private portal for the transfer of documents containing sensitive personal information. This portal is viewable only by AET, you, and any additional person you designate, such as a spouse or financial advisor. This portal will remain available to you for 12 months after the completion of our work, so you can view your tax documents and print additional copies, if needed.

**We double-check our work.** Before you receive your finished tax documents, they will be thoroughly reviewed by another member of the AET team for tax theory and computational execution. We stand behind our work.

✦ With over 30 years of experience, American Expat Tax Services offers **year round services** for people with tax situations in more than one country, by people with extensive international tax experience. We understand your needs.