


Value Added Service Bundles

	BASICS* \$120CAD/\$90USD	SUPPLEMENTAL* \$270CAD/\$200USD	FULL CARE 40% of invoice (min \$675CAD/\$500USD)
PENDING ITEMS - REGULAR FOLLOW-UP¹	NO	YES	YES
WORK DIRECTLY WITH THIRD PARTIES (Financial advisors, Banks, Employers, etc.)	YES ON REQUEST	YES ON REQUEST	YES ON REQUEST
DUE DATE REMINDERS AND AUTOMATIC US RETURN EXTENSIONS	NO	YES	YES
RESPOND TO CP75/LTR12C/PROCESSING REVIEW	YES	YES	YES
RESPOND TO MATCHING/CP2000 OR ITIN LETTERS	NO	YES	YES
RESPOND TO OTHER IRS/CRA CORRESPONDENCE	NO	NO	YES
TRANSCRIPT/NOTICE OF (RE)ASSESSMENT REVIEW	NO	UP TO TWO	UNLIMITED
AMENDED RETURNS	NO	NO	YES
AUDIT REPRESENTATION	NO	NO	YES-UP TO 5 HOURS
ESTIMATED TAX/INSTALLMENT PLANNING	NO	AS REQUESTED	AS REQUESTED
OFFSEASON CONSULTATION/QUESTIONS	½ HOUR	1 HOUR	UNLIMITED
24/7 ACCESS TO ONLINE PORTAL STORAGE OF RETURNS FOR 12 MONTHS²	NO	YES	YES

*Service Bundle is applied on a 'PER RETURN' Basis

¹nagging, pestering, needling, carping, badgering, hounding ©

²Portal system is normally used for document transfer ONLY, not storage. Documents uploaded to portal would usually be deleted 14 days after upload – refer to your engagement letter for details