


Value Added Service Bundles

***Basic and Supplemental Service Bundles are applied on a 'PER RETURN' Basis**

	BASICS* \$165CAD/\$125USD	SUPPLEMENTAL* \$500CAD/\$375USD	FULL CARE 40% of invoice (min \$1065CAD/\$800USD)
WORK DIRECTLY WITH THIRD PARTIES (Financial advisors, Banks, Employers, etc.)	YES (ON REQUEST)	YES (ON REQUEST)	YES (ON REQUEST)
PENDING ITEMS - REGULAR FOLLOW-UP¹	NO	YES	YES
DUE DATE REMINDERS AND AUTOMATIC US RETURN EXTENSIONS	NO	YES	YES
RESPOND TO CP75/LTR12C/CRA PROCESSING REVIEW	YES	YES	YES
FOLLOW UP RE: PROCESSING CHANGES	YES	YES	YES
RESPOND TO CRA MATCHING/CP2000 LETTER	NO	YES	YES
RESPOND TO OTHER IRS/CRA CORRESPONDENCE	NO	NO	YES
AMENDED RETURNS	NO	NO	YES
OBTAIN/REVIEW TRANSCRIPT/CRA NOTICE OF (RE)ASSESSMENT	NO	UP TO TWO	UNLIMITED
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

All engagements will be automatically billed the "Basics" bundle (with an option to 'Opt out'). Without purchasing one of the Value Added Service Bundles, any services provided by AET other than the preparation of the tax or information return (or follow up due to an error made by AET) will be billed at our regular hourly rates for Audit/Representation Services.

¹nagging, pestering, needling, carping, badgering, hounding - AET is not obligated to follow up for information previously requested ©