


## Value Added Service Bundles

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

	<b><u>BASICS*</u></b> \$235CAD/\$175USD	<b><u>SUPPLEMENTAL*</u></b> \$500CAD/\$375USD	<b><u>FULL CARE</u></b> 40% of invoice (min \$1080CAD/\$800USD)
<b>WORK DIRECTLY WITH THIRD PARTIES</b> (Financial advisors, Banks, Employers, etc.)	YES (ON REQUEST)	YES (ON REQUEST)	YES (ON REQUEST)
<b>PENDING ITEMS - REGULAR FOLLOW-UP<sup>1</sup></b>	NO	YES	YES
<b>DUE DATE REMINDERS AND AUTOMATIC US RETURN EXTENSIONS</b>	NO	YES	YES
<b>RESPOND TO CP75/LTR12C/CRA PROCESSING REVIEW</b>	YES	YES	YES
<b>FOLLOW UP RE: PROCESSING CHANGES</b>	YES	YES	YES
<b>RESPOND TO CRA MATCHING/CP2000 LETTER</b>	NO	YES	YES
<b>RESPOND TO OTHER IRS/CRA CORRESPONDENCE</b>	NO	NO	YES
<b>AMENDED RETURNS</b>	NO	NO	YES
<b>OBTAIN/REVIEW TRANSCRIPT/CRA NOTICE OF (RE)ASSESSMENT</b>	NO	UP TO TWO	UNLIMITED
<b>AUDIT/REPRESENTATION</b>	NO	NO	YES (UP TO 5 HOURS)
<b>ESTIMATED TAX/INSTALLMENT PLANNING</b>	NO	AS REQUESTED	AS REQUESTED
<b>OFFSEASON CONSULTATION/QUESTIONS</b>	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.**

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