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Instructions for Income Tax

- You will soon receive a DocuSign package via email containing your completed Tax Return
- After reviewing and approving your Return, please sign the <u>T183</u> (and other documents, if indicated) and return it to us in one of the following ways:
 - Electronically by following the prompts in <u>DocuSign</u>. (The documents will automatically be returned to us.)
 - Once all the signing spots have been filled you must click on "finish" to complete the signing process.
 - By printing and signing the documents by hand and returning them by mail, dropping them off in person between 12-2pm Mon-Fri or through our door slot anytime, or scanning and emailing them back (please send to general@shipleygroup.ca).
- We strongly recommend that you save PDFs of your documents, as you will not be able to access them again once the DocuSign link has expired. **Requests for additional copies of tax returns will be subject to a \$60 reprint fee per return.**
- If you owe taxes, a <u>T7DRA Remittance Voucher</u> will be enclosed with your package. This can be taken to your bank for payment.
- PDF scans of your source documents are also included in the package. *Please note: all original source documents will be destroyed unless specifically requested to be held for pickup by the client.*
- Options to pay our invoice: cheque in person at our office, e-transfer to <u>general@shipleygroup.ca</u>, or phone in a credit card number.
 - Please retain a copy of the invoice for your records.
- If you have any questions or concerns or would like an appointment to review your tax return, we would be happy to accommodate. You may call our office, send us an email, or use the online booking system found on our website to schedule a time.

PLEASE NOTE:

We will require your <u>signed T183</u> and <u>invoice payment</u> to E-File your return.