CPA Kaur
Leave the accounting to me

Tax Return Preparation Process

Thank you for our recent conversation. As discussed, I'd like to outline the next steps in our workflow to ensure everything proceeds smoothly with your tax return filing:

1. **Client Intake Form**
   Please complete and return the attached **Client Intake Form**. This is essential for collecting the required personal and financial information to prepare your authorization form. Please review tax checklist to collect all necessary information for claiming deductions and credits.

2. **Authorization with CRA**
   Once I receive your completed intake form, I will prepare an **Authorization Form (AUT-01)**, which allows me to represent you with the Canada Revenue Agency (CRA). This form is important as it enables me to speak with CRA on your behalf for any questions related to your return. Please review and sign this form when you receive it.

3. **Tax Return Preparation**
   After receiving the necessary information, I will prepare your tax return and send it to you for review. Along with the return, I will include the invoice for my services.

4. **Review & Questions**
   You are welcome to ask any questions during the review stage. Once you are satisfied with the return, please proceed with payment of the invoice.

5. **Mandatory CRA Signature Form (T183)**
   Before I can electronically file your return, CRA requires a signed **Form T183**. This form authorizes me to e-file your tax return on your behalf. I will send this via Adobe Sign or email for your signature.

6. **Final Submission**
   After receiving both the signed T183 form and payment, I will electronically file your return and send you a confirmation of submission for your records.

Please let me know if you have any questions at any point in the process. I look forward to assisting you with your tax filing.