

POLICY STATEMENT

ACCOUNT INFORMATION

- Accounts are due when rendered. Unfortunately we are not in the position to offer financing and this includes credit. We accept cheques, cash, Visa, Mastercard, Interac. Returned cheques are subject to a \$40 fee to cover time and charges for recovery. If you have an outstanding balance at the time statements are issued (15th and end of month), there will be a statement charge equal to 2% of the total outstanding balance.

- For our larger customers, please note that there is a scaled [rate](#) for various functions. If you require an estimate as to what you require, please be sure to be specific so you will not be surprised when invoiced for work done, but not included in the estimate. For a list of our usual rates, please see our [schedule of fees](#).

- We are happy to offer corporate rates depending on volume of support hours required; please feel free to inquire about this service

- Please note that accounts must be paid in full before any compliance item can be filed. This includes T1 personal returns and T2 corporate returns. Please be aware that just because you have signed your return, it may not be filed if you have an outstanding balance. You are responsible for any penalties and interest due to unfiled returns caused by outstanding accounts.
- Any accounts outstanding for more than 15 days are subject to a hold on further work until the account has been paid in full, without exception.

- With tax returns, generally it is our policy to give you back documents used in the preparation of preparing your return once your account is settled. In addition, we generally give you a cover letter and T1 jacket. For the majority of our clients, that is all they want as they endeavor to keep their return cost to a minimum. If you would like more details, specific schedules or the entire return, please tell us in advance. We would be more than happy to print off more detail and the additional pages will be reflected slightly in your return. The standard photocopy charges may apply for schedules requested after your return has been printed and filed.

APPOINTMENTS

- While we try to make office appointments at your convenience, there are times when extraneous factors interfere. It is always appreciated if you confirm your appointment, or let us know if you need to reschedule.

- We offer outcall appointments to seniors, people who are housebound and to those who are unable to come by our office at a mutually convenient time. Please note, however, that while we endeavor to do our utmost to arrive at the designated time, all outcall appointment times are subject to a plus/minus half-hour leeway – that is, we reserve the right to show up somewhere

within the half hour either side of your appointment time. Unfortunately we cannot always predict things like traffic, or office calls.

- Appointments are generally booked for specific purposes, and while we offer a wide range of services, and support a wide variety of software, please note: unscheduled training is invoiced at double the normal rate

CHARGES

- Daytime weekday outcall appointments for other than pickup of T1 personal tax return information, is a minimum charge of two (2) hours, and all times are rounded to the nearest 1/4 hour. Weekend daytime outcall appointments (onsite bookkeeping) are a minimum charge of four (4) hours. Pickup of T1 returns *MAY* be subject to travel time charges in April or at other non-business times.
- Please note that effective April 1, 2005, with the increase in the gas tax, there has been an increase in travel time.
- Outcall appointments will have appropriate travel charges added to them. There
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