

**AUTHORIZATION TO EFILE /TERMS & CONDITIONS – TAX YEAR \_\_\_\_\_**  
**PARTS A AND B MUST BE COMPLETED IN FULL BY EACH INDIVIDUAL HAVING**  
**THEIR TAXES PREPARED BY SAUVE TAX SERVICES (STS)**  
**PART C (LOOK FOR THE BIG BLACK ARROW) MUST BE SIGNED!**

**Part A – Identification & Address (must be completed in full)**

First Name:	Last Name:	<b>SOCIAL INSURANCE NUMBER</b>					
Mailing Address:	PO Box:	City:	Province:	Postal Code:			

**If you sold your home in this tax year, the following information is required:**  
Year you originally purchased the home you sold: \_\_\_\_\_  
The address of the home you sold including postal code: \_\_\_\_\_  
  
The **amount** the home was sold for: \$ \_\_\_\_\_  
If you purchased a home in this tax year – is this the **first home owned** by you or your spouse (or an ex-spouse) in the **last 5 years**?  

**YES      NO      (Please circle one)**

**Part B – Telephone Numbers & Email (must be completed in full as applicable)**

Email:	
Home #:	Cell #:

**Part C – Declaration and Authorization (must be signed)**

I declare that the information entered in Part A and B is correct and complete. The information provided to STS fully discloses my income from all sources. I also declare that I have read the information on this form including Part D (Terms & Conditions) and that the electronic filer identified in Part E is filing my return.

**X** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Part D – Terms and Conditions**

I appreciate the opportunity to work with you and advise you on income tax matters. The Canada Revenue Agency (CRA) imposes penalties upon taxpayers and tax return preparers, for failure to observe due care in reporting claims on your income tax return. In order to ensure an understanding of our mutual responsibilities, I ask all clients for whom I prepare a tax return to confirm the following arrangements. By signing Part C of this form, you agree to the terms and conditions below:

- STS will prepare your personal income tax return based on the information that you provide us. We will not audit or otherwise verify the data you submit (including Business & Rental Activities or Employment Expenses, unless bookkeeping services have been pre-arranged), although we may ask you for clarification of some of the information. This includes informing us of any foreign interest, trusts, pensions or self-employment income (including tips) that you may have received. You represent that you will provide us with accurate and complete information necessary to prepare your tax return.
- It is our responsibility to prepare your tax return correctly according to the law and with the information that you have provided. It is your responsibility to provide us with all the information required to prepare a complete and accurate return. You should retain all the documents, cancelled cheques and other data that forms the basis of your income and deductions including claiming rent and/or property taxes for Ontario Trillium Benefits. These may be necessary to prove the accuracy and completeness of the return to CRA. Should you advise us to make a claim on your Income Tax Return without being in possession or providing us with the documents to support a claim at the time of filing, it will be your responsibility to provide us or CRA with the information should you be reviewed or re-assessed. If STS advises you not to make a claim on your return and you still decide to make said claim against this advice (which will be noted in your file), STS is released from any further responsibility if you are reviewed or reassessed.
- STS respects the privacy of personal information, that is, information that identifies you as an individual, or that is associated with such identifying information. By engaging our services, you agree to provide the personal information necessary for us to meet your service request. Before you provide us with any personal information on behalf of others, STS must be provided with copies of specific documentation such as Power of Attorney for incapacitated individuals, or Wills & Death Certificates for deceased individuals that proves that you have consent for collecting, using and disclosing this information, according to privacy legislation. STS will not rent, sell, or otherwise make your personal information available to any third-party without your permission. Personal information is used solely to complete your service request, to inform you of changes in our business or service offerings, and to maintain our professional correspondence with you. The one non-business exception is a **one-time email** (via blind carbon copy) to you sometime in mid-August asking you to sponsor us for the **Terry Fox Run**. This is not an obligation but a one-time request.
- Unless otherwise notified, STS will automatically check the box that allows CRA to provide your name and address to Elections Canada for voting purposes.
- CRA occasionally reassesses tax returns and in some cases, a balance owing can ensue. This could be due to a computer, omission, calculation or human error. Any reassessment by CRA will be dealt with on a case by case basis. The balance owing could comprise of three components: reassessment, penalty, and interest. Depending on the nature of the error or omission, STS may be held liable for only the penalties & interest portion of the balance owing if any, from the date that CRA notified the individual of the reassessment. In the case where an individual did not disclose information that leads to a reassessment or did not keep adequate records, STS cannot be held liable for **ANY** portion of the balance owing. Should an error (computer, calculation, omission or human) result in a reassessment that causes a client to have a balance owing for a refund they have already received, STS will be responsible for the interest and/or penalties portion of the reassessment **ONLY**. STS will not reimburse an individual money already received as a refund from CRA **in any situation** if an individual is reassessed and has to repay the refund money due to that reassessment.
- Fees charged by STS for tax preparation **DO NOT** include the time involved for lengthy reviews. If CRA reviews your income tax return and this involves a complicated and lengthy review, you as the tax payer are expected to compensate STS for the time taken to prepare the information CRA is requesting (this includes faxes, phone calls and the time taken to prepare the information being reviewed). The hourly rate charge is \$70/hour.

**Part E – Electronic Filer Identification**

Name of person or firm: <b>Josee Sauve, Todd Sauve (o/a Sauve Tax Services)</b>	Electronic Filer Number: <b>BB277</b>
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