

Appendix - Canadian Tax Return and Service Pricing*

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| • Basic full year income tax return, T1** | \$250+/return |
| • Basic Spouse/Dependent add-on return – full year** | \$100+/return |
| • Rental forms - Statement of Real Estate Rentals, Form T776 | \$200+/form |
| • Statement of Business or Professional Activities, Form T2125 | \$500+/return |
| • Part-year Arrival First Year | \$250+/return |
| • Part-year Departure Final Year (T1161 and T1243 basic departure tax) | \$500+/return |
| • Basic Canadian Non-Resident income tax return | \$200+/return |
| • Basic Foreign Income Verification Statement, Form T1135 | \$250+/form |
| • Canadian non-resident rental return (Section 216) | \$250+/return |
| • Certificate of Compliance T2062/T2062A | \$600+/each |
| • Non-resident withholding tax letter (Part XIII) | \$150+/each |
| • Preparation of Canadian T1 tax estimate payments | \$100/estimate |
| • Underused Housing Tax (First UHT-2900 Form) | \$1000 |
| • Underused Housing Tax (Additional UHT-2900 Form) | \$200/form |
| • Contributions to Non-resident Trusts, Form T1141 | Hourly |
| • Distributions from Non-resident Trusts, Form T1142 | Hourly |
| • Tax Consultations - Canada Departure or Arrival/Expat | Hourly |
| • Amended Tax Return and loss carrybacks, T1-ADJ or T1A | Hourly |
| • Tax planning & form applications (ITN, RRSP, payroll, NR4, NR6) | Hourly |
| • Correspondence and phone calls with Canada Revenue Agency | Hourly |
| • Bookkeeping Services/working with third parties (advisors, banks etc) | Hourly |

*All fees are in CDN funds and subject to provincial sales tax. Hourly fees are \$300/hour. Retainers are taken for all estimates of \$500 and above. EFILE of tax returns only after account is settled. Pricing in effect March 1, 2023.

** Basic returns are of the complexity typically associated with a simple taxpayer and no more than 5 tax slips or 5 transactions and 5 donations slips. A return including complex tax forms, or transactions is not a basic tax return. For example, returns that include T2091, T2209, T777, T1032, T2203, T1170, report transactions involving hedging, swaps, cryptocurrency, or other financial instruments, returns including a significant number of tax slips or capital gains/losses (more than 5 tax slips or transactions), rental properties, small business, sole proprietor or self-employed returns or returns reflecting information from more than 1 Canadian partnership (Form T5013s) are not considered basic returns. T1135 completed worksheets required. Hourly fees are applicable for bookkeeping services if taxpayer does not provide requested expense summary schedules and receipts are not organized.

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