

Effective as of January 1, 2021 - subject to change without notice

Fees listed are minimum estimates - all fees are \$ per person / per return

DID YOU KNOW all CGL personal tax filings have us listed as the first contact for a tax audit unless you tell us otherwise? If you get a phone call, text, or email saying they are from the CRA, they are either a scam, or you can have them contact us. Just one more service we provide at no extra charge to protect you from scammers!

10% ELECTRONIC ONLY DISCOUNT - HERE IS HOW YOU CAN SAVE!

- 1) **Scan** or take pictures of your tax information in high resolution
- 2) **Send electronically** using our secure client portal by following the padlock at the bottom of our website
- 3) **No Paper** sent, you don't come to our office during tax season, and you don't get a paper copy back
- 4) **Sign electronically** your forms with Adobe Sign or print and sign at home, scan/take picture to send back
- 5) **Pay CGL online** by credit card or through Interac e-transfer to payments@CGLtax.ca
- 6) **Download your return** copy through our secure client portal within 30 days of us sending it back to you

If you still need to send us paper records and would like to courier them, use our volume-discount rate by printing your shipping label: <https://www.canadapost.ca/information/app/prse/label?policyId=PR562865&LOCALE=en> or visit your local Post Office and use Canada Post Return ID Number: **PR562865**
 This charge will be added to your CGL invoice, but should be a lower rate than doing it yourself

All Fees below include a Paper Copy of your Tax Return and Return Courier through Canada Post

STEP 1 - Choose your Return Base Fee

(A) \$ 170	T-Slip	T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RSP, T4RIF, T5, T5007 slips (not T3 - see below)		
		<table border="0"> <tr> <td style="vertical-align: top;"> T1 General (including former Schedule 1 - Federal Tax Calculation) Provincial Tax Return xx428 (except Quebec - extra fee required) Schedule 2 / xxS2 - Amounts Transferred from Spouse/Common-Law Carrying charges / Accounting fees (formerly Schedule 4) Schedule 6 - Canada Workers Benefit Schedule 8 - Canada Pension Plan Contributions and Overpayment Schedule 14 - Climate Action Incentive T183 - Information Return for Electronic Filing of Tax Return </td> <td style="vertical-align: top;"> T1 Summary / Slip Summary / Carry Forward Summary T7DRA - Tax Return Remittance Voucher T90 - Income Exempt under the Indian Act Professional Dues / Union Dues deduction T657 - Calculation of capital gains deduction T936 - Calculation of cumulative net investment loss (CNIL) T2204 - Employee Overpayment of E.I. Premiums Estimates of GST/HST Credit and RRSP Deduction Limit </td> </tr> </table>	T1 General (including former Schedule 1 - Federal Tax Calculation) Provincial Tax Return xx428 (except Quebec - extra fee required) Schedule 2 / xxS2 - Amounts Transferred from Spouse/Common-Law Carrying charges / Accounting fees (formerly Schedule 4) Schedule 6 - Canada Workers Benefit Schedule 8 - Canada Pension Plan Contributions and Overpayment Schedule 14 - Climate Action Incentive T183 - Information Return for Electronic Filing of Tax Return	T1 Summary / Slip Summary / Carry Forward Summary T7DRA - Tax Return Remittance Voucher T90 - Income Exempt under the Indian Act Professional Dues / Union Dues deduction T657 - Calculation of capital gains deduction T936 - Calculation of cumulative net investment loss (CNIL) T2204 - Employee Overpayment of E.I. Premiums Estimates of GST/HST Credit and RRSP Deduction Limit
T1 General (including former Schedule 1 - Federal Tax Calculation) Provincial Tax Return xx428 (except Quebec - extra fee required) Schedule 2 / xxS2 - Amounts Transferred from Spouse/Common-Law Carrying charges / Accounting fees (formerly Schedule 4) Schedule 6 - Canada Workers Benefit Schedule 8 - Canada Pension Plan Contributions and Overpayment Schedule 14 - Climate Action Incentive T183 - Information Return for Electronic Filing of Tax Return	T1 Summary / Slip Summary / Carry Forward Summary T7DRA - Tax Return Remittance Voucher T90 - Income Exempt under the Indian Act Professional Dues / Union Dues deduction T657 - Calculation of capital gains deduction T936 - Calculation of cumulative net investment loss (CNIL) T2204 - Employee Overpayment of E.I. Premiums Estimates of GST/HST Credit and RRSP Deduction Limit			
(B) \$ 200	Simple	Includes (A) plus Child Care, Donations, RRSP Slips, Tuition, COVID Work From Home		
		<table border="0"> <tr> <td style="vertical-align: top;"> Schedule 5 - Details of Dependant Schedule 7 - RRSP Unused Contributions, Transfers, HBP or LLP Activities Schedule 9 - Donations and Gifts Schedule 11 / xxS11 - Tuition, Education and Textbook Amounts *** NEW *** *** NEW *** </td> <td style="vertical-align: top;"> T778 - Child Care Expenses Deduction Student Loan Interest Estimates of Child Care Benefit eligibility Home Buyer's Amount T775 - Statement of Employment Expenses for Working at Home Due to COVID-19 Digital News Subscription expenses - Must be a "Qualified Canadian Journalism Organization" </td> </tr> </table>	Schedule 5 - Details of Dependant Schedule 7 - RRSP Unused Contributions, Transfers, HBP or LLP Activities Schedule 9 - Donations and Gifts Schedule 11 / xxS11 - Tuition, Education and Textbook Amounts *** NEW *** *** NEW ***	T778 - Child Care Expenses Deduction Student Loan Interest Estimates of Child Care Benefit eligibility Home Buyer's Amount T775 - Statement of Employment Expenses for Working at Home Due to COVID-19 Digital News Subscription expenses - Must be a "Qualified Canadian Journalism Organization"
Schedule 5 - Details of Dependant Schedule 7 - RRSP Unused Contributions, Transfers, HBP or LLP Activities Schedule 9 - Donations and Gifts Schedule 11 / xxS11 - Tuition, Education and Textbook Amounts *** NEW *** *** NEW ***	T778 - Child Care Expenses Deduction Student Loan Interest Estimates of Child Care Benefit eligibility Home Buyer's Amount T775 - Statement of Employment Expenses for Working at Home Due to COVID-19 Digital News Subscription expenses - Must be a "Qualified Canadian Journalism Organization"			
(C) \$ 230	Basic	includes (B) plus Medical, Home Accessibility, Disability Amount, Senior Income Split		
		<table border="0"> <tr> <td style="vertical-align: top;"> Home accessibility expenses (formerly Schedule 12) Medical Expense calculations and recording Note even if medical are not able to be claimed they are still entered to track for the potential 12-month carry-forward for next year </td> <td style="vertical-align: top;"> T929- Disability supports deduction T1032 - Joint Election to Split Pension Income </td> </tr> </table>	Home accessibility expenses (formerly Schedule 12) Medical Expense calculations and recording Note even if medical are not able to be claimed they are still entered to track for the potential 12-month carry-forward for next year	T929- Disability supports deduction T1032 - Joint Election to Split Pension Income
Home accessibility expenses (formerly Schedule 12) Medical Expense calculations and recording Note even if medical are not able to be claimed they are still entered to track for the potential 12-month carry-forward for next year	T929- Disability supports deduction T1032 - Joint Election to Split Pension Income			
(D) \$ 260	Advanced	Includes (C) plus T3, T101, T1204, T5004, T5008, and T5013 slips		
		<table border="0"> <tr> <td style="vertical-align: top;"> Schedule 3 - Capital Gains (or Losses) T-slip and Summaries only (dispositions of real estate or private company shares are extra) T1A - Request for loss carry-back CPT20 - Election to Pay Canada Pension Plan Contributions CPT30 - Election to Stop Contributing to the Canada Pension Plan or Revocation of a Prior Election (must be aged 65-69) </td> <td style="vertical-align: top;"> T1212 - Statement of Deferred Security Options Benefits T5004 - Claim for tax shelter loss or deduction </td> </tr> </table>	Schedule 3 - Capital Gains (or Losses) T-slip and Summaries only (dispositions of real estate or private company shares are extra) T1A - Request for loss carry-back CPT20 - Election to Pay Canada Pension Plan Contributions CPT30 - Election to Stop Contributing to the Canada Pension Plan or Revocation of a Prior Election (must be aged 65-69)	T1212 - Statement of Deferred Security Options Benefits T5004 - Claim for tax shelter loss or deduction
Schedule 3 - Capital Gains (or Losses) T-slip and Summaries only (dispositions of real estate or private company shares are extra) T1A - Request for loss carry-back CPT20 - Election to Pay Canada Pension Plan Contributions CPT30 - Election to Stop Contributing to the Canada Pension Plan or Revocation of a Prior Election (must be aged 65-69)	T1212 - Statement of Deferred Security Options Benefits T5004 - Claim for tax shelter loss or deduction			

Effective as of January 1, 2021 - subject to change without notice

Fees listed are minimum estimates - all fees are \$ per person / per return

STEP 1 - SEE PREVIOUS PAGE

STEP 2 - Add additional Forms & Schedules required (price is per form & schedule / per return)

+ 30 The following will add \$30 per form, schedule, or service to your Step 1 base fee from above

RC267/268/269 - Employee Contributions to a United States Retirement Plan or Specified Foreign Pension Plan	Foreign income (per type and per country)
T691 - Alternative Minimum Tax (AMT)	T2209 - Foreign Tax Credit Summary
T777 - Other employment expenses (no vehicle or home expenses)	Per T4, T4A, T5018 slip we prepare for your employee/contractor
T1ADJ - T1 Adjustment Request to prior year, if CGL prepared the return	TL2 - Claims for Meals and Lodging Expenses
*** NEW *** GST370 for Eligible Employment Expenses	"Eligible Educator" school supply tax credit (requires school name and approval, description of supplies, and amounts)

+ 60 The following will add \$60 per form, schedule, or service to your Step 1 base fee from above

T1170 - Capital Gains on gifts of certain capital property	T2091 - Designation of a Property as a Principal Residence
T1198 - Statement of Qualifying Retroactive Lump-Sum Payment	T2125 - Statement of Business Activities (no expenses)
T1206 - Tax on Split Income (TOSI)	T2222 - Northern Residents Deduction
*** NEW *** T1 for Minor - flat fee at home, under 18, Child Tax Returns (with preparation of supporting parent)	
*** NEW *** Per Vehicle - Per Schedule for Employment, Business, Farm, Fishing, or Rental Expense purposes	
Per - Other Provincial Specific Tax Credit Forms (Ex: BC Training Tax Credit / Ontario Trillium Benefit)	
Schedule 3 - Capital Gains (or Losses) - Sales of real estate, Qualified farm or fishing property, private company shares	
This fee does not include detailed public securities dispositions required where no summary provided	

+ 90 The following will add \$90 per form, schedule, or service to your Step 1 base fee from above

T776 - Rental Statement per detached property	T2201 - Disability Tax Credit Application Assistance
T777 - Other employment expenses (vehicle extra See above)	T2203 - Provincial and Territorial Taxes for Multiple Jurisdictions
T1135 - Foreign Income Verification Statement - Simplified Method	T2205 - Spousal RRSP/RRIF/SPP amount for income inclusion
T1223 - Clergy Residence Deduction	GST/HST Return (with preparation of income tax filings)
*** NEW *** T1 for Student - flat fee for college/university Student Tax Return (with preparation of supporting parent)	

+ 120 The following will add \$120 per form, schedule, or service to your Step 1 base fee from above

T1M - Moving Expenses	T1OVP - Individual Tax Return for RRSP Excess Contributions
T1135 - Foreign Income Verification Statement - Detailed Method	T1 - Final - Terminal Filing of Deceased Person Return
T2042 - Statement of Farm Activities (vehicle extra See above)	T1 - 70(2) - Rights or Things Elective Return for Deceased Person
T2125 - Statement of Business Activities (vehicle extra See above)	T1 - 164(6) Election for Loss-Carry Back from Estate
Schedule 3 - Capital Gains (or Losses) - Details of public traded securities where no summary has been provided	

+ 150 The following will add \$150 per form, schedule, or service to your Step 1 base fee from above

T1ADJ - T1 Adjustment Request to prior year, if prior returns and details provided, where CGL did not prepare the return

***** NEW *** Minimum bookkeeping charge if summaries are not provided for:**

T776 - Rental Statements	T2042 - Statement of Farm Activities (vehicle extra See above)
T777 - Employment Expenses	T2125 - Statement of Business Activities (vehicle extra See above)
TL2 - Claims for Meals and Lodging Expenses	

SPECIAL SURCHARGES & RATES

30 % surcharge on personal returns received after April 21 of the filing year

\$400 hourly rate for forms, schedules, or services not listed