

Effective as of January 1, 2023 - subject to change without notice

Fees listed are **minimum estimates** - all fees are listed as per person and per return

- Steps** **10% ELECTRONIC SERVICES ONLY DISCOUNT - Save Trees & Save Fees program**
- 1) **Scan** or take pictures of your paper tax information in high resolution
 - 2) **Send electronically (do not email)** - go to **secure.CGLtax.ca** or click the padlock at the very bottom of CGLtax.ca
 - 3) **No Paper & No Meeting** - you don't meet with us during tax season, and **you don't get a paper copy back**
 - 4) **Sign forms electronically** with our secure online service, **or** print and sign at home, scan/take picture to send back
 - 5) **Pay with Interac e-transfer** to payments@CGLtax.ca or online by Credit Card* (*1.5% Credit Card processing fees apply*)
 - 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

STEP 1 - MINIMUM FEE PACKAGE ESTIMATES

(A) \$ 200	Autofill Only	Only includes T4, T5 and T4-type Related Slips readily available from CRA online at time of filing
	T1 General (including former Schedule 1 - Federal Tax Calculation)	T7DRA - Tax Return Remittance Voucher
	Provincial Tax Return xx428 (except Quebec - extra fee required)	Carrying charges / Accounting fees Deduction (formerly Schedule 4)
	Schedule 2 / xxS2 - Amounts Transferred from Spouse/Common-Law	Professional Dues / Union Dues deduction (if on T4 slip)
	Schedule 6 - Canada Workers Benefit	T657 - Calculation of capital gains deduction
	Schedule 8 - Canada Pension Plan Contributions and Overpayment	T936 - Calculation of cumulative net investment loss (CNIL)
	T183 - Information Return for Electronic Filing of Tax Return	T2204 - Employee Overpayment of E.I. Premiums
	Estimates of Climate Action Incentive; Canada Child Benefit; GST/HST Credit; RRSP Deduction Limit; and Canada Training Credit	
(B) \$ 230	Basic	Includes All of Package (A) plus Child Care, RRSPs, Tuition Transfers, Student Loan Interest
	Schedule 5 - Details of Dependant	T778 - Child Care Expenses Deduction
	Schedule 7 - RRSP Unused Contributions, Transfers, HBP or LLP Activities	Student Loan Interest
	Schedule 11 / xxS11 - Tuition, Education and Textbook Amounts	Estimates of Child Care Benefit eligibility
	T777S - Statement of Employment Expenses for Working at Home Due to COVID- T90 - Income Exempt under the Indian Act	
(C) \$ 260	Our Most Common	Includes Packages (A & B) plus Medical Summaries, Home Buyer's, Senior Income Split
	Home Buyer's Amount	T929 - Disability supports deduction
	Schedule 9 - Donations and Gifts	Home accessibility expenses (formerly Schedule 12)
	Medical Expense calculations and recording for claiming and carry-forward	T1032 - Joint Election to Split Pension Income
(D) \$ 290	Detailed	Includes All of Packages (A, B, & C) plus T3 Slips, T1204, T5008, and T5013 slips
	Schedule 3 - Capital Gains (or Losses) where T-slips and Realized Gain/Loss Summaries are provided	
	T1A - Request for loss carry-back	T3 Slip Reconciliations (where investment Summaries Provided)
	CPT20 - Election to Pay Canada Pension Plan Contributions	T5008 Slip Reconciliations (where Gain/Loss Summaries Provided)
	CPT30 - Election to Stop Contributing to the Canada Pension Plan or Revocation of a Prior Election (must be aged 65-69)	
(E) \$ 320	Enhanced	Includes All of Packages (A, B, C & D) plus Extra Detailed Entries
	Schedule 3 - Capital Gains (or Losses) - where Manual Detailed Entry is required for Real Estate or Private Corporation Transactions	
	T1212 - Statement of Deferred Security Options Benefits	T691 - Alternative Minimum Tax (AMT)
	Per - Other Provincial Specific Tax Credit Forms (Ex: BC Training Tax Credit / Ontario Trillium Benefit)	
	Digital News Subscription expenses - Must be a "Qualified Canadian Journalism Organization"	
	"Eligible Educator" school supply tax credit (requires school name and approval, description of supplies, and amounts)	
(FFF)	Family Flat Fees	Our "Triple-F" add-ons to keep your family returns together
\$ 60	T1 for Minor - flat fee - Not eligible for discounts	- Under 18 years old during year (with preparation of supporting parent/guardian)
\$ 90	T1 for Student - flat fee - Not eligible for discounts	- Attending School and < 25 years old during year (with preparation of supporting parent/guardian)
\$ 120	T1 for Spouse or Common-Law Partner with no source of income - flat fee - Not eligible for discounts	(with preparation of supporting spouse)

FOR STEP 2 - Additional Items - See next page

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FOR 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

T777 - Other employment expenses (no vehicle or home expenses)	Foreign income (per type and per country)
T1ADJ - T1 Adjustment Request to prior year, if we prepared the return	T2209 - Foreign Tax Credit Summary (per country)
GST370 for Eligible Employment Expenses	Per T4, T4A, T5018 slip we prepare for your employee/contractor

+ 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)	T5004 - Claim for tax shelter loss or deduction
RC267/268/269 - Employee Contributions to a United States Retirement Plan or Specified Foreign Pension Plan	
Per Vehicle - Per Schedule for Employment, Business, Farm, Fishing, or Rental Expense purposes	

+ 100 The following will add \$100 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
T1223 - Clergy Residence Deduction	T2205 - Spousal RRSP/RRIF/SPP amount for income inclusion
GST/HST Return (with preparation of income tax filings)	

***** NEW ***** 30 Minute - Form Guidance Meeting with Administrative Staff

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

T1M - Moving Expenses	T1 - Final - Terminal Filing of Deceased Person Return
T1135 - Foreign Income Verification Statement - Simplified Method	T1 - 70(2) - Rights or Things Elective Return for Deceased Person
T2042 - Statement of Farm Activities (vehicle extra)	T1 - 164(6) Election for Loss-Carry Back from Estate
T2125 - Statement of Business Activities (vehicle extra)	*** NEW *** TL2 - Claims for Meals and Lodging Expenses
	*** NEW *** T2222 - Northern Residents Deduction

***** NEW ***** 30 Minute - Advisory Meeting with File Preparer Staff

+ 250 The following will add \$250 per form, schedule, or service to your Step 1 base fee from above

T1OVP - Individual Tax Return for RRSP Excess Contributions	T1135 - Foreign Income Verification Statement - Detailed Method
T1ADJ - T1 Adjustment Request to prior year, if prior returns and details provided, where CGL did not prepare the return	
Schedule 3 - Capital Gains (or Losses) - Details of public traded securities or cryptocurrency where no Gain/Loss summary has been provided	

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

T776 - Rental Statements (per property)	T2042 - Statement of Farm Activities
T777 - Employment Expenses	T2125 - Statement of Business Activities
TL2 - Claims for Meals and Lodging Expenses	

***** NEW ***** 30 Minute - Tax Advisory Meeting with Tax Specialty CPA

SPECIAL SURCHARGES & RATES

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

\$ 500 hourly rate for forms, schedules, or services not listed