



KGR BOOKKEEPING SERVICES

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<http://kgr-bookkeeping.vpweb.ca/>

Virtual Tax Process Checklist

Send KGR Bookkeeping Services an email or call to request service.

You will receive a link to your free Verifyle® account for secure document sharing and communication with KGR Bookkeeping Services. All documents sent to and from KGR Bookkeeping will be through Verifyle®. You will first be sent an Engagement Agreement to be thoroughly reviewed & signed, and documents of KGR Bookkeeping Services' policies to review.

Send KGR Bookkeeping Services:

- 1) The signed Engagement Agreement.
- 2) A completed Tax Preparation Checklist Questionnaire and any other applicable forms & statements required. If applicable, send a completed Client Authorization Third Parties Information Sharing Request to be reviewed by KGR Bookkeeping Services before signing. All forms are available on KGR Bookkeeping Services' website.
- 3) For new clients, for proof of identification, a copy of a government issued photo ID or a copy of your previous year's income tax return
- 4) Any supporting documents (Tslips, receipts, etc.) or necessary information needed to complete your income tax return

You will receive the CRA form (AUT-01) to authorize KGR Bookkeeping Services as your representative, which is to be signed and returned. If we received a completed Client Authorization Third Parties Information Sharing Request by you, you will be sent a signature request.

Your return will be completed in 1-7 days of receiving all needed documents & you will be sent a summary of your return for review & approval. You can book a phone consultation or email feedback of any questions or concerns, and for any changes to be completed.

When given final approval, you will be sent a T183 form & invoice. Once KGR Bookkeeping Services receives the signed T183 form & invoice payment, your return will be sent through EFILE (if qualified) & your final tax return will be sent to you.

Ensure you download and save an electronic copy and/or print all your documents and final return from Verifyle® within 30 days of electronic filing date. You should keep these for a minimum of 7 years.

Verifyle® is a highly secure, CPA member used, document sharing third-party application that KGR Bookkeeping Services uses to share documents and communicate with tax clients. Please review KGR Bookkeeping Services' procedures and policies regarding the use of Verifyle® and other third-party applications.

For more information regarding how to use Verifyle® visit <https://verifyle.com/how-it-works.html>

For more information regarding the security of Verifyle® visit <https://verifyle.com/security.html>

Verifyle® is in compliance with Part 1 (Protection of Personal Information in the Private Sector) and Part 2 (Electronic Documents) of the Personal Information Protection and Electronic Documents Act (PIPEDA). For more compliance information visit <https://verifyle.com/compliance.html>

