



# Victoria Accounting Services

*Shipley Enterprises Ltd.*

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## Welcome, New Tax Clients!

This is a list of information we will need from you to complete your tax return:

- Previous year's Tax Return & Notice of Assessment/ Reassessment
- Social Insurance Number
- Date of Birth
- Current contact information including: address, phone number, and email
- Marital Status
- Dependents (if applicable)
- Completed Income/Expense Summaries (if applicable) – Business, Rental, etc.
- Our default method of delivery is electronic.
  - **If you would prefer a paper copy, please let us know.**

Please return the requested documents and information to us in one of the following ways:

- by email to [general@shipleygroup.ca](mailto:general@shipleygroup.ca) (scan your slips and send as pdfs)
- by dropping off through our mail slot at any time
- in person by knocking on our door between **12pm and 2pm, Monday-Friday.**

Once we have your basic personal information, we will need you to sign an “Authorization to Represent a Client” form (AuthRep). This can be sent for electronic signing via DocuSign.

Thank you! We look forward to making this tax season easy for you.

Yours truly,

The Staff at the Shipley Group