THANK YOU FOR YOUR BUSINESS

COMMUNICATIONS
MAKING THE COMPLEX SIMPLE

SHARI PEARCE
OFFICE: 613 473 4004 CELL: 613 849 5069
EM: SHARI@SDPCOMMUNICATIONS.CA

www.sdpcommunications.ca

SDP COMMUNICATIONS

INCOME TAX SEASON

PERSONAL & SMALL BUSINESS



SHARI PEARCE
BUSINESS CONSULTANT

Shari is a problem-solver who isn't afraid to take on challenges, especially personal income tax. It is her passion to help others and working with numbers is what drew her into the income tax business. Shari has been in business for 25 years and as obtain several certifications to help small businesses as well as individuals. After completing the income tax preparation training along with accounting and bookkeeping classes, Shari launched Bookkeeping & Tax Services to her list of business services that SDP COMMUNICAITIONS offers. Shari has prepared and filed income taxes on behalf of many local individuals as well as business owners. She is proud of the reputation that she has developed over the years for doing high-quality work in an area that many people find stressful and confusing.

Shari loves working and living with her family in Madoc, located in Hastings County. She believes Hastings County's best characteristic is all of the wonderful people who live here and make up the communities. In Hastings County, one can make real personal connections with your customers. You see them outside your place of business and create interpersonal relationships. Client referrals are spread among the community as word spreads about your services making business easier.

Shari believes that the future is bright, despite some economic setbacks. The possibilities for growth are endless, especially for small business owners. The community has proven resilient in the past, adding creativity and invention will continue to drive community forward.

SDP COMMUNICATIONS
MAKING THE COMPLEX SIMPLE

Business Contract

This agreement dated _____, 2022 is made by SDP Communications and - _____.

This agreement will begin _____, 2022; either party may cancel this agreement on thirty days notice to the other party in writing, by registered mail or personal delivery.

Place Where Services Will Be Rendered
The consultant will perform services in accordance with this contract at SDP's office, 37 Morrison Road, Eldorado, Ontario, using the internet and email to transfer files unless otherwise stated.

Services Provided

_____ hereby agrees to engage SDP Communications to provide the following services. _____

Payment to Consultant
The consultant will be paid a monthly package fee of _____ + HST per month or a one time payment _____ for work performed in accordance with this agreement. SDP will submit an itemized invoice setting forth the time spent and services rendered, client will pay SDP within 7 business days.

Confidential Information
SDP agrees that any information received by the company or individual, which concerns the personal, financial or other affairs of the company/individual, will be held in full confidence.

Signatures
Both the company and the consultant agree to the above contract.

Company/Individual: _____,

Dated: _____ Signature _____

Consultant: SDP Communications – Shari Pearce

Dated: _____, 2022 Signature *S. Pearce*

SDP COMMUNICATIONS 1999 ©

Credit Card Authorization Form

Name on the Card: _____

Type of Card: ❑ Visa ❑ Mastercard ❑ American Express

Account Number _____

Expiration Date _____

Security Code _____

Billing Address _____

City, Prov/State, PC/Zip _____

Phone Number _____

Order/Invoice Number _____

Item(s) Purchased _____

_____

Amount to be Charged _____

By signing this form, you authorize SDP COMMUNICATIONS **to charge your card for the amount listed above.**

Signed: _____ Date: _____

CLIENT INFORMATION

FULL NAME:	
ADDRESS:	
EMAIL:	
PH:	DATE OF BIRTH:
SIN:	MARITAL STATUS:
SPOUSE NAME: (IF CLAIMING SPOUSE)	NUMBER OF DEPENDANTS:

RATES

Personal Income Tax	$60.00 (tax included)
Small Business Tax	Quote will be provided after consultant call.

Payable by: Cash, Cheque, Visa, Mastercard or Etransfer
Etransfer to: sdpcommunications@gmail.com (direct deposit)

Indicate What Service You Are Looking For:

❑ Personal Income Tax

❑ Small Business

CONSENT

I, _____ give consent to Shari Pearce the owner of SDP COMMUNICATIONS to complete my income tax.

I, _____ understand that SDP COMMUNICATIONS does not provide a "Cash Back" program and that my taxes will be netfile and a CRA confirmation will be attached with the Income Tax forms upon completion.

Signature: _____ Dated: _____

CANADIAN TAX CHECKLIST

We want to make sure you get every tax credit and deduction you're entitled to. So, before you get started on your taxes, make sure you have all the receipts and income records you need.

Here's a handy checklist:

SLIPS	
	T4 slips (Employment income)
	Employment insurance benefits (T4E)
	Interest, dividends, mutual funds (T3, T5, T5008)
	Tuition / education receipts (T2202A)
	Old Age Security and CPP benefits (T4A-OAS, T4AP)
	Other pensions and annuities (T4A)
	Social assistance payments (T5007)
	Workers' compensation benefits (T5007)
	All other information slips

RECEIPTS	
	RRSP contribution receipts
	Support for a child, spouse or common-law partner
	Professional or union dues
	Tool expenses (Tradespersons & apprentice mechanics)
	Other employment expenses
	Teacher's school supplies
	Medical expenses
	Moving expenses
	Home renovations (seniors and disabled)
	Transit pass receipts (before July 2017)
	Charitable donations
	Political contributions
	Child care expenses
	Adoption expenses
	Interest paid on student loans
	Carrying charges and interest expenses
	Office - in-home Expenses
	Exams for professional certification

OTHER	
	Notice of Assessment/Reassessment
	Canada Revenue Agency correspondence
	Sale of principal residence
	Property Tax Payment
	Sale or deemed sale of stocks, bonds or real estate
	Northern residents deductions receipts
	Rental income and expense receipts
	Business, farm or fishing income/expenses
	Automobile / Travel logbook and expenses
	Disability Tax Credit Certificate
	Declaration of Conditions of Employment (T2200)
	Volunteer Firefighters certification
	Volunteer Firefighters certification
	Volunteer Firefighters certification
	Written certification for eligible educator school supplies

ANY ADDITIONAL NOTES TO SHARE WITH SDP COMMUNICATIONS

SDP COMMUNICATIONS
MAKING THE COMPLEX SIMPLE

613 473 4004
shari@sdpcommunications.ca
sdpcommunications.ca

CANADIAN SMALL BUSINESS TAX CHECKLIST

We want business owners to get every tax credit and deduction they're entitled to.

SOLE-PROPRIETORSHIPS

If you are a sole proprietor you do not need to file a separate tax return for your business income, you report your business income on your personal tax return (T1).

Sole Proprietor:

- ☐ All your T-slips for the year
- ☐ Information of any other income
- ☐ Business income and expenses compilation for the year to be filed – if bookkeeping is completed
- ☐ Invoices and receipt, payroll information and GST/HST returns – if bookkeeping needs to be completed
- ☐ GST/HST return(s) for the tax year
- ☐ Financial statements – if already prepared
- ☐ Invoices and receipts, payroll information and GST/HST returns – if bookkeeping needs to be completed
- ☐ Last year's return
- ☐ Copy of business license
- ☐ Latest Notice of Assessment
- ☐ Accounts receivable at end of fiscal year
- ☐ Amounts payable at end of fiscal year
- ☐ Employee deductions payable at end of fiscal year

Business Income

- ☐ Gross receipts from sales or services
- ☐ Sales records
- ☐ Returns and allowances
- ☐ Business chequing/savings account interest
- ☐ Other income
- ☐ Cost of Goods Sold (if applicable)
- ☐ Accounts receivable at end of fiscal

Inventory

- ☐ Beginning inventory total dollar amount
- ☐ Inventory purchases
- ☐ Ending inventory total dollar amount
- ☐ Items removed for personal purposes
- ☐ Materials and supplies

SDP COMMUNICATIONS
MAKING THE COMPLEX SIMPLE

Expenses

- ☐ Advertising
- ☐ Business insurance – for business assets, liability
- ☐ Vehicle expenses – fuel, insurance, lease/bill of sale, payments with interest, repairs, maintenance, parking, car washes
- ☐ Mileage log or kilometers driven for business purposes
- ☐ Payroll data for employees; PD7A; statement of account for current source deductions
- ☐ Other employee expenses
- ☐ Professional fees – lawyers, accountants, and consultants
- ☐ Office supplies
- ☐ Interest expense – business loans, investments expenses and interest
- ☐ Travel
- ☐ Rent/Property tax
- ☐ Utilities
- ☐ Accounts payable at end of fiscal year
- ☐ Meals and entertainment: Receipts should have a list of who attended and the purpose of the meeting/event. Generally, 50% deductible, including gift certificates. *Note: if you provide M&E to all your employees 100% can only be claimed for special events (up to 6 times per year). Exceptions for events that benefit registered charities.*

Home Office Expenses

If you work out of your home, you may be able to deduct a portion of your home offices expenses.

These expenses include:

- ☐ Mortgage interest (not principal) or rent
- ☐ Property tax payments
- ☐ Utilities
- ☐ Home insurance payments
- ☐ Home maintenance and repair costs
- ☐ Cable/Internet