



LOUIS T PICCO *
CHARTERED ACCOUNTANT

March 4, 2014

RE: IT'S TAX TIME AGAIN!

The April 30, 2014 deadline for filing your 2013 personal tax return is fast approaching. In order to help us prepare your 2013 tax return, please spend some time in the near future to gather and sort all of your tax information. For some helpful hints, see the attached 2013 personal tax checklist. Once you have everything organized, please deliver your information to our office so that your tax return can be prepared in a timely manner. If you have any questions regarding your 2013 personal tax return, please don't hesitate to contact our office.

Thank you for your business & support!

Another service that we offer our clients is assistance in locating exceptional service providers. Due to our client list and contacts through a networking association, we may be able to assist you in locating a variety of talented service providers. Please see the attached letter that provides more details and please do not hesitate to contact us if you require some help in any of these areas.

Yours truly,

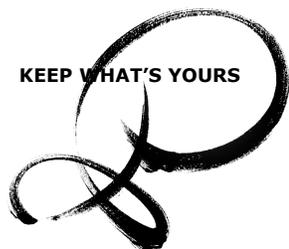
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RE: 2013 PERSONAL INCOME TAX RETURN

The following checklist is to assist you in determining the information you need for your 2013 tax return:

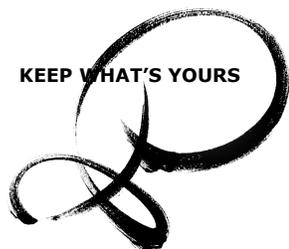
1. Your 2012 (last year's) Notice of Assessment from the Canada Revenue Agency (CRA).
2. All income information slips such as T3, T4, T4E, T4F, T4A, T4U, T5, etc.
3. A listing of all other sources of income such as alimony, scholarships, fees, foreign source income or non-taxable dividends, Canada Savings Bonds.
- 4. Details on any foreign assets you own that are over \$100,000.**
5. Tuition and education credit certificates – T2202/T2202A (signed on the back of both copies) and any tuition fee receipts.
6. A statement of professional/ business/ rental income or all receipts, invoices, expenses, etc. required for the preparation of such statements.
7. A schedule of disposition of any capital assets during the year, showing the details of the sale and information, re: original cost or valuation day values.
8. The financial statements of any partnerships, etc. with which you are involved.
9. The details on carrying charges and interest expense relating to any business or investment opportunities.
10. The official receipts for contributions to Registered Retirement Savings Plans or Registered Pension Plans. They must be the OFFICIAL receipts.
11. A list of your childcare expenses, including the social insurance number and address of the babysitter/care provider.
12. A list of your charitable donations, together with applicable receipts.

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13. A statement of your medical expenses, together with the applicable receipts. Please note, your B.C. MSP premiums are not eligible. You may claim private health care premiums, eyeglasses, hearing aids, medical aids, dental work, prescriptions, hospitalization and ambulance service, to name a few. From these expenses we must deduct any amount that you recovered from a private or government medical plan. If you are not sure if some of your receipts are deductible, include them with the rest of your receipts just in case they are.
14. The total amount of the installment payments you made to the Canada Customs and Revenue Agency during the year.

This list is not all-inclusive, but it should help you provide us with most of the information that we will need. If you can give us all of the above material at one time, it will undoubtedly help to keep any increase in time and costs as small as possible.

We appreciate all your assistance in organizing your 2013 your tax information!

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Referral Assistance

An additional Service we offer to our clients is to help in locating exceptional service providers. Due to our varied client list and our contacts through a marketing association, we may be of great assistance in locating the appropriate:

- Acupuncturist
- Business Coach
- Chiropractor
- Commercial Realtor
- Computer IT Services
- Education Savings Specialist (RESPs)
- Employee Benefits Consultant
- Fine Food Caterer
- Insurance Advisor
- Investment/Wealth Advisor
- Lawyer (business, estate planning, real estate & personal Injury)
- Marketing Consultant/Graphic Designer
- Massage Therapy
- Mortgage Broker
- Natural Skin Rejuvenation Clinic
- Personal Coach
- Personal Fitness Trainer
- Photographer (Commercial & Lifestyle)
- Printer (Commercial and Financial)
- LEAN Productivity Consultant
- Residential Realtor
- Web Site Designer

If you are having any difficulty finding a quality service provider in any of the above areas (or any other area), please do not hesitate to contact us and we can further discuss your circumstances.

Yours Truly,

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