

INSTRUCTIONS

TAX RETURN PREPARATION



As a valued client, we want to ensure that you have collected all the necessary information so that we can prepare your return accurately and efficiently.

CRA My Account

If you have not already registered, the CRA is encouraging [individuals](#) and [businesses](#) to register for My Account or My Business Account to ensure secure, online access to tax and benefit information.

Registration is an easy way to authorize McKay & Associates as a representative for your personal tax, business tax, trust tax, or other matters.

Engagement letter

1. Review and sign the engagement letter.

Enter your name and address at the top and by signing at the bottom, you are confirming McKay & Associates are to prepare the tax return on your behalf.

Checklist and worksheets

2. Complete the checklist and/or the worksheets as required.

The checklist is to assist both you and our firm to ensure the completeness of your return, therefore review each question to determine if it applies to you.

Supporting documents

3. Collect all supporting slips and documents that are needed to complete your return per the checklist. Send us an electronic copy of all documents required to prepare your return and keep the original(s) for your file.

Electronic portal

4. Once you are ready for us to prepare your tax return, reach out to us via email or call the office and we will send you a secure portal link to upload the signed engagement letter, completed checklist and electronic copy of supporting slips and documents.

To protect your personal information, we strongly encourage using our secure portal to submit all documents. If you experience any technical issues, please call or email us.

As an alternative you can drop off or mail in your documents. Be sure to include your full name, phone number and email address. Please note, email is not a preferred method for sensitive documents.

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Deadline to submit to our firm

5. The earlier that we receive your information, the earlier your return will be completed. We cannot guarantee completion of your return by this year's personal tax deadline of **April 30, 2026** if we receive your information after **April 15, 2026**.

Tax refund

6. If you are expecting a tax refund and you have not already enrolled in direct deposit, visit this site for ways to enroll [Direct deposit for individuals in Canada - Canada.ca](https://www.canada.ca/en/revenue-agency/services/e-file/e-file-returns/individuals/direct-deposit.html).

Electronic filing (E-File)

7. E-File of all tax returns is mandatory by The Canada Revenue Agency unless they require a paper return to be filed.

Before our firm will E-File your return, you will be required to sign Form *T183 Information Return of Electronic Filing of an Individuals Income Tax and Benefit Return* which authorizes our firm to E-File your return. This form will be available with your completed return.

Completed return

8. Once completed, our staff will notify you, by phone or email, that your return is ready and inquire as to how you would prefer to receive the final documents for your review and signature. You may visit the office, or we could upload to the secure portal link. If you wish for our firm to email you the documents, we must have on file the signed engagement letter acknowledging the Electronic Communications clause.

Always here to help

If you have any questions about your tax forms, uploading documents or accessing our portal, please contact us at info@mckaycpas.ca or 1-867-633-5434.