TAX PREPARATION SERVICES AT RAYMOND JAMES

A guide to the personalized service and support offered by our Tax Professionals.

RAYMOND JAMES®

Get to know our dedicated Tax Professionals.

Our Tax Professionals are here to prepare Canadian Federal and Provincial tax returns for clients who are individuals, corporations or trusts. Using state-of-the-art tax software systems combined with over 20 years of experience, we provide an exceptional standard of service you won't find just anywhere. And we do it all backed by the strength and resources of the country's largest independent wealth management firm.

RAYMOND JAMES

Founded in 1962, Raymond James[1] is one of the largest financial services firms in Canada and the United States, serving both institutional and retail clients around the globe.

Raymond James has more than 18,900 associates worldwide and 8,464 financial advisors who collectively manage US$1.26 trillion in client assets. With 136 consecutive quarters of profitability[2], Raymond James consistently ranks among the best-managed and most client-focused corporations in respected national surveys. Our success is based on the firm's unwavering commitment to its founding core values: client first, conservatism, independence and integrity.

RAYMOND JAMES

Founded in **1962**

$1.26 *trillion in total client assets worldwide*[2]

[1] Tax preparation services are provided through Raymond James Ltd.

[2] As of December 31, 2021

Past performance is not indicative of future results. The information provided is for informational purposes only and is not a solicitation to buy or sell Raymond James Financial stock.

INDEPENDENCE INTEGRITY CONSERVATISM CLIENT FIRST

Raymond James was founded on these core values – values that still guide us today.

WHAT SETS RAYMOND JAMES TAX SERVICES APART?

1. WE WORK DIRECTLY WITH YOUR FINANCIAL ADVISOR

We have direct access to your financial advisor and can incorporate any tax planning strategies into your tax return filing. Your financial advisor will have access to your tax return information so that it can be referred to in providing you a comprehensive wealth management solution. A traditional accounting firm does not have that same level of access and integration with your financial advisor.

2. WE HAVE IMMEDIATE ACCESS TO YOUR INVESTMENT TAX RECEIPTS

We can obtain your investment tax receipts directly from your Raymond James investment account, and apply them to your tax return. This includes any amendments, capital gain/loss reporting, and foreign asset (T1135) filing requirements that you may have. We also have the transactional history of your investment accounts should any of your tax filings require this historical information.

3. WE HOLD OURSELVES TO THE HIGHEST STANDARDS OF CLIENT SERVICE

Each member of our team is committed to and passionate about providing you with the highest level of client service. And that dedication is complemented – and deepened – by the service-centred culture that Raymond James was founded on, and on which it continues to thrive.

4. OUR TEAM OF PROFESSIONALS IS EXCEPTIONALLY KNOWLEDGEABLE AND EXPERIENCED.

We have assembled a team of exceptionally experienced, dedicated, and caring professionals. We have been providing these services to our Wealth Management clients for over 20 years. Our team consists of professionals who have received the most comprehensive tax training available in Canada.

EXPERT HELP CAN EASE THE BURDEN

If you find that your tax returns are becoming too complex, or if you are unsure that you are benefiting from all the available tax saving strategies, our tax professionals can help. We will review your tax situation and provide you with a no obligation quotation for our services before we begin.

HOW WE WORK WITH YOU

Initial meeting

We will collect your tax information and provide you with a complimentary quotation for our services (if required). We will then request that you sign an engagement letter and Canada Revenue Agency representative forms.

Tax preparation

We will begin preparing your tax return based on the information you have provided. If you are an existing client, we will send you a reminder letter annually to request your tax information.

Tax return filing

One of our tax professionals will contact you and review your tax return with you. We will clarify all parts of the tax return so that we are both comfortable with the accuracy and completeness of the tax return. We will send you an authorization form for signature, so that we may file the tax return on your behalf.

Completion

We will mail you a final package containing: your tax return as filed, all supporting original documents, our letter to you, and our invoice for services rendered.

Retention of documentation

We retain copies of your information for any Canada Revenue Agency follow-up questions. We will provide ongoing assistance with CRA requests at no additional charge as long as you remain a client of our tax services department.[3]

OUR SERVICES

Our Tax Professionals can provide the following tax preparation filing services:

Individuals:

- T1 – Personal tax returns

Corporations;

- T2 – Corporate tax returns[4]

Trusts/Estates;

- T3 – Trust and Estate tax returns[4]

Non-Profit Organizations;

- T1044 – Non-Profit Organization information return[4]
- T2 – Corporate tax returns[4]
- T3010 – Registered Charity Information Return[4]

Partnerships;

- T5013 – Partnership Information Return[4]

Additional tax services that are incidental to the completion of the tax returns noted above;

- T4 – Statement of remuneration
- T5 – Statement of investment income
- Filing of Clearance Certificate
- Tax election filings
- Tax information returns
- Provincial tax returns/filings
- Pre-assessment review and reassessment assistance
- Notice of objections or Appeals

HOW DO I GET STARTED?

Speak with your financial advisor and let them know of your interest in our Tax Preparation Services. One of our Tax Professionals will then contact you to begin our tax preparation process. Our coordinated efforts are designed to file your tax returns as promptly and efficiently as possible.

[3] This does not include CRA audits, which will be billed separately from your tax return as they are more complex and time intensive.

[4] We can only provide tax preparation services to entities that have investment assets as their primary assets. Active companies, complex entity structures, or widely held entities are outside of the scope of services that we are able to provide.

LIFE WELL PLANNED.

RAYMOND JAMES®

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