



# New Client Welcome Package



## Contents

Welcome to Chartered Professionals Accountants 4 Information Technologists ..	2
Working as a Team .....	3
Personal Aim .....	4
Benefits of Joining CPA4IT .....	4
Client Zone .....	4
Data Protection .....	4
Frequently Asked Questions .....	4
In Office/Virtual Meetings .....	5
Events and Seminars .....	5
Audit Representation Protection .....	5
Help Us Help You .....	5
Investment Services .....	6
Going Green .....	6
Change of Contact Details .....	6
Contact Info & Feedback .....	6
Other Locations.....	7
Social Media.....	7



## Welcome to Chartered Professionals Accountants 4 Information Technologists

From all the partners, managers and staff, we would like to take this opportunity to welcome you to Chartered Professionals Accountants 4 Information Technologists (CPA4IT), we are a Network of Chartered Professional Accountants for IT Professionals, IT Consultants, IT Contractors, Project Managers & Small Businesses. By choosing CPA4IT, you are joining a team that has combined years of experience with progressive modern ideas from our Partners and Staff. We are committed to providing you with the best services and innovative tax strategies, most of which you may not have thought an Accounting and Tax firm could offer. We are thrilled to be working with you and help you in your business. You are essential to us and we appreciate you.

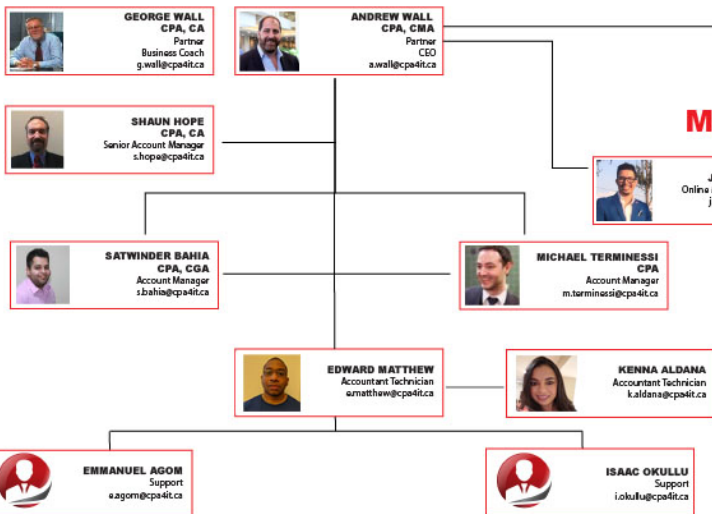
The enclosed package includes all the necessary information to ensure you and your business gets the most out of CPA4IT.



## Working as a Team

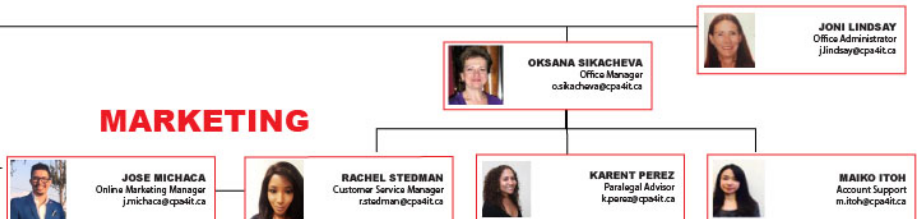
At CPA4IT, we work with you. We understand that collaboration allows a more productive and proactive relationship, and we believe this approach is an important factor in ensuring you get the best for you and your business.

### ACCOUNTING



### ADMINISTRATION

### MARKETING





## Personal Aim

Our aim is to take the time to get to know you, your family, your business and your financial goals. We will spend time briefing the team involved in your affairs so that they fully understand your requirements too. We encourage input from all staff, as we know that ownership, ability to question, being heard and feeling involved all lead to an engaged and committed team.

## Benefits of Joining CPA4IT

- More than 30years experience serving business owners
- Free business coaching
- Personal attention to each and every client
- A progressive and proactive firm of Chartered Accountants and Tax Advisors
- CPA4IT networking and seminar events
- A wide range of services to offer a variety\_ of solutions to each and every client
- Staff members trained in accordance to and beyond industry standards

## Client Zone

Use our Client Zone to send us documents quickly and easily. You will be given your own username and password to allow you to upload documents securely. You can access your Client Zone through the Sharefile Login on our CA4IT website ([www.cpa4it.ca](http://www.cpa4it.ca)).

## Data Protection

To enable us to provide our service(s) to you, we may use, process and disclose personal data about you and your company. This is necessary for other related purposes including updating and enhancing client records, analysis for management purposes and statutory returns, crime prevention and legal and regulatory compliance. When processing data on your behalf, we confirm that we comply with the relevant provisions of the Personal Information Protection and Electronic Documents Act.

## Frequently Asked Questions

Check the Frequently Asked Questions section (FAQ) on our website for general accounting information on a number of topics. If your specific question is not answered in the FAQ section, please email the question to [customerservice@cpa4it.ca](mailto:customerservice@cpa4it.ca) and we will respond to your question via email.



## In Office/Virtual Meetings

Meetings can be held in our office or online. We have the ability to hold telephone conference calls with multiple phones in multiple locations, or online meetings via web access.

## Events and Seminars

As part of our ongoing commitment to being a progressive firm of Accountants and Tax Advisors, we regularly host events and seminars in Toronto covering a variety of topics to support and encourage our clients' growth. For a complete listing of upcoming events, please visit our website [www.cpa4it.ca/events](http://www.cpa4it.ca/events)

## Audit Representation Guarantee

We offer audit representation Guarantee for a fee of \$200 plus HST in addition to the cost of year-end accounting services. We guarantee that we will stand by your firm if it is subject to an audit or reassessment by the Canada Revenue Agency. Such audits can be stressful and time consuming for all parties involved. CA4IT will handle all negotiations, objections and appeals until the final stage of appeal without further charge for any professional time incurred on the matter. The \$200 fee is waived if you select a prepayment plan option.

## Help Us Help You

Fees can often be higher than necessary from staff members having to sort and organize accounts.

Below are some helpful hints that will ensure your fees are kept to a minimum:

- Make sure all records are provided ensuring no information is missing; have you included bank records, invoices, and deposit books?
- Organize records in a way that can easily be understood by someone else: type of expense, date, numerical or alphabetical order.
- Keep all personal and business transactions separate.
- A bookkeeper can reduce the workload of an accountant and at a lower rate. Bookkeeping is a service provided by our firm.
- Before making a major business decision or investment, discuss it with us first. We may be able to consult on the matter or recommend someone who can.



## Investment Services

The Investment industry is regulated under the Investment Canada Act. We are licensed by the Institute of Chartered Accountants in Canada and Ontario as a designated professional body under that Act. We may be able to provide certain investment services where these are complementary to the professional services we are providing to you.

## Going Green

At CA4IT we recognize the importance of our carbon footprint on the environment. With our online filing system we dramatically reduce the amount of paper waste in our offices, resulting in a fast, organized and efficient system.

## Change of Contact Details

If any of your contact details change, please email [customerservice@cpa4it.ca](mailto:customerservice@cpa4it.ca) as soon as possible to inform us about the changes.

## Contact Info & Feedback

We like to hear from you about the quality of service you receive from CA4IT. By knowing what your concerns are, it gives us the opportunity to make the necessary changes and improve overall customer service.

To give us your feedback, please e-mail, telephone or visit:

Wall & Associates Professional Corporation

478 Richmond Street West

Toronto, ON M5V 1Y2

Toll-Free: 1-800-465-7532

Fax: (888) 988--8318

Email: [customerservice@cpa4it.ca](mailto:customerservice@cpa4it.ca)

To ensure that we can deal with your enquiry promptly and efficiently, our office hours are Monday to Friday 9:00am – 5:00pm.



## Social Media

Keep up-to-date with the latest news, announcements and events by joining our Facebook, Twitter and LinkedIn pages. Also please visit our website blog for more tips and updates.

<http://www.facebook.com/cpa4it>

[http://twitter.com/cpa4it\\_ca](http://twitter.com/cpa4it_ca)

<https://www.youtube.com/channel/UC0LcAtQgm87DoufONLulmRw>

<http://www.linkedin.com/company/439211>