



# 2023 U.S. PERSONAL INCOME TAX ENGAGEMENT LETTER

Dear Sir or Madam:

**Re: U.S. tax forms under IRS Streamlined Filing Compliance Procedure for Non-Filer U.S. Taxpayer**

We would like to thank you for allowing us to prepare your U.S. tax forms under IRS Streamlined Filing Compliance Procedure.

During our engagement, we will rely on you to provide us with complete and accurate information so that we may prepare your return(s) in a timely manner. We wish to emphasize that you are responsible for the accuracy and completeness of the information included in your return(s), including details with respect to the ownership of all your assets in foreign countries (meaning foreign to the U.S.) including bank and financial accounts (i.e. RRSP, RESP, TFSA, RRIF, etc.). *We will assume that you have no such possessions if you do not provide any information.* We are providing guidance to you in accumulating all the required information and preparing the return(s) for you.

Our services will not result in an audit of any information provided to us. We will rely entirely on your representations. Unless informed differently, we are not aware of any illegal or possibly illegal acts for which you have not disclosed to us all facts related thereto.

An invoice indicating our fee in Canadian currency will be provided with your return(s) and is payable upon receipt. For your convenience, invoices may be paid by Visa, MasterCard, Interac, Interac E-Transfer or cheque. We would be happy to provide an estimate of our fee in advance of our preparation of your return(s).

Please note that our fee for the preparation of your return(s) does not include any representations made by LOGAN KATZ LLP. In the event of an audit by a government tax authority nor does it include various requests by a government tax authority for documents and slips subsequent to the filing of your return(s), detailed research exercises which are specific to your situation, and follow up time with respect to erroneous assessments by a government tax authority.

**Upon completion of your return(s), a package containing the return and other important information will be provided to you. You are responsible to open this package, verify the contents, and address all matters enclosed, within the required deadlines. Failure to do this may result in significant interest and penalties, for which we are not responsible.**

The arrangements outlined in this letter will remain applicable from year to year unless changed by either you or us in writing. If you are in agreement with the above noted terms, please sign and date this letter where indicated, and return it to us.

In connection with this engagement, we may communicate with you or others via telephone, facsimile, post, courier and email transmission. As all communications can be intercepted or otherwise used or communicated by an unintended third party, or may not be delivered to each of the parties to whom they are directed and only to such parties, we cannot guarantee or warrant that communications from us will be properly delivered only to the addressee.

Therefore, we specifically disclaim and waive any liability or responsibility whatsoever for interception or unintentional disclosure of communications transmitted by us in connection with the performance of this engagement. In that regard, you agree that we shall have no liability for any loss or damage to any person or entity resulting from: communications, including any consequential, incidental, direct or indirect; special damages, such as loss of revenues or anticipated profits; or disclosure or communication of confidential or proprietary information.

By signing this letter, you are expressly confirming that you are providing all information with respect to income earned and all the deductions you wish to be claimed were incurred for the purposes of earning income. **If you are in agreement with the above noted terms, please sign and date this letter at the bottom of this page, and return it to us.**

**Also, below**, please list the names of the individuals - for example, each family member for whom we are preparing a personal income tax return - covered by these terms.

If you have any questions concerning this matter, please do not hesitate to contact us.

Yours very truly,



LOGAN KATZ LLP  
CHARTERED ACCOUNTANTS

-----  
The following are the individuals covered by the terms of this engagement (please print full name):

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_
- 6. \_\_\_\_\_
- 7. \_\_\_\_\_
- 8. \_\_\_\_\_
- 9. \_\_\_\_\_
- 10. \_\_\_\_\_

**I agree with the terms and conditions as set out in this engagement letter. I confirm that I am providing all the information with respect to income earned in regards to the years we are filing tax returns, and all the deductions I wish to be claimed were incurred for the purposes of earning income.**

---

Date	Please PRINT name	Signature
------	-------------------	-----------

---