

## Tips to Minimize Professional Fees

- Make an appointment with Dave if you have a complex situation, or if you have any questions about your tax situation
- Include a summary of non-registered investment income, including capital gains/losses realized (if not held with Investia through our office)
- Organize your T-slips, medical and charitable donation receipts by category (do not separate copies)
- **Medical:** if you have a lot of prescription receipts, get a summary printout from the pharmacy
- Include fully-completed bookkeeping Income and Expense summary for your unincorporated business (do not include receipts)
- Bring everything in **ONE PACKAGE** as soon as you have all your personal tax info
- Become an investment client of Dave's and receive a discount on your tax prep fee