

Procedures for electronic transmission of income tax documents:

Security of information

Your income tax documents contain information on your personal identity, and you should always take precautions to protect this information. Utilizing regular email services could expose this data, therefore we utilize a secure customer portal to send and receive your information. Where you utilize regular email for this purpose, we caution that you do so at your own risk. When you request that we send personal information via regular email you acknowledge that we do not accept any liability for misuse of this data due to the un-secure method of delivery.

Exchange of data

1. If you don't already have a folder in our **Client Portal**, call our office to set one up. 604-465-1935
 - a. Your folder is only accessible by our staff and by you
 - b. You set up your own password
 - c. You will receive notifications when new documents are put in the folder for you.
 - d. Subfolders are set up by taxation year
2. **PDF** documents are preferred vs pictures of documents.
3. **Single PDF files** that include all slips and data in one pdf document are preferred
4. One of the benefits of electronic interchange of data is **efficiency**. Documents sent as pictures need to be reformatted at our end into a PDF file. Multiple documents have to be combined into single PDF files. Sending multiple files and different file types significantly reduces this efficiency.
5. **Smart phone scanning**. There are several smart phone apps available to enable submission of PDF files instead of pictures, they also allow you to combine multiple documents into a single file. Many of these apps are free:
 - a. iScan
 - b. Tiny Scanner
 - c. CamScanner
 - d. Others
6. We will prepare your return from the information provided.
7. We utilize "DocuSign" and "AdobeSign" for you to satisfy all your signature requirements electronically and securely.
8. Payment can be submitted electronically for our invoice if not prepaid. We recommend interac E-transfer. Email address for E-transfers is linda@raincoastadvisors.com
9. Your return is not filed until you have electronically signed where required and have paid our invoice. We will follow up with you when a response is outstanding.
10. We upload your completed return to the Portal for your future reference and archive. The copy uploaded to the portal is a full version of your return, not just a summary.