

# Personal Income Tax Return

## Key Tax Process 2024







Tax season is officially here, and we're reaching out to ensure a smooth, secure, and accurate filing process for you. Below, you'll find key facts and updates about our 2024 tax filing process.


### **How to Complete Your Return with Us**


1. Gather your documents – Use the attached checklist to ensure you have everything.
2. Submit securely – Upload via our portal or drop off documents at our office (*see drop-off policy below*).
3. Review & sign – Choose electronic or printed signature options.
4. Receive your completed return – We'll finalize and submit it for you!
5. Receive an electronic copy of your bill – Sent via email shortly after signing your return.

### **Key Tax Deadlines**

To ensure timely filing, please keep these important dates in mind:

-  March 1, 2025 – RRSP Contribution Deadline (for 2024 tax year deductions)
-  April 11, 2025 – Plugged-IN CPA Document Submission Deadline (for guaranteed filing)
-  April 30, 2025 – Personal Tax Filing & Payment Deadline (*Avoid late filing penalties and interest.*)
-  June 15, 2025 – Self-Employed Tax Filing Deadline (*Note: Payments still due April 30.*)

 *We will always strive to file your return on time, even if documents are received after April 11. However, priority will be given to clients who submit by this deadline.*

 *Our standard turnaround time is 2 weeks, but this depends on receiving complete documentation upfront.*

### **Mandatory Tax Checklist – Attached**

To ensure all relevant information is captured, all clients—new and returning—must complete the attached checklist before submitting their documents.

### **Introducing SuiteFiles – A Secure & Efficient Document Collection System**

We know our old portal was frustrating, so we've upgraded! We are now using SuiteFiles Connect to enhance security, efficiency, and accuracy during tax season. Submitting documents through this portal ensures:





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- ✓ Bank-level security – Protects your sensitive tax data from cyber threats
- ✓ No risk of misplaced documents – Avoid lost files from scattered emails or texts
- ✓ All family tax documents in one place – Upload for yourself, your spouse, and dependents in a single portal
- ✓ Faster processing – Organized, complete files allow us to process your return more efficiently.

### How to Access SuiteFiles & Upload Your Family's Documents

-  Check your email for an invitation to your secure tax folder.
-  Click "Open SuiteFiles Connect" or "View Portal."
-  Select "Sign Up" and create a login with your email and password.
-  Navigate to the "Portal" folder and upload ALL tax documents for yourself, your spouse, and dependents in one place.


### New \$100 Fee for Non-Standard Submissions (Email, Text, & Drop-Offs)

To improve workflow and ensure data security, we have implemented a \$100 fee for non-standard submissions. This applies to:


-  Documents submitted via email or text – To protect your personal information, we will no longer accept tax documents via email or text. These methods pose a security risk and increase the chance of missing or misplaced documents.
-  Documents dropped off in person – Paper documents require additional scanning, handling, and limit the staff who can work on your return.
-  How to Avoid This Fee:
  - ✓ Use SuiteFiles Connect – Our secure portal ensures faster processing and real-time tracking. We promise – It's easy to use!

### Need Assistance?

If you have any questions or need help accessing the portal, please don't hesitate to reach out.

 **Email:** [taxes@pluggedincpa.com](mailto:taxes@pluggedincpa.com)

 **Phone:** 506-455-5397

 **Office Hours:** Monday – Friday, 8:30 AM – 5:00 PM *(During peak tax season, we often check emails after hours!)*

**Best regards,**  
The Team at Plugged In CPA