



## American Expat Tax Services (AET)

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American Expat Tax Services (AET) is a specialized team of tax preparers with superior knowledge in complex tax situations arising from tax obligations on both sides of the US/Canada border. We offer comprehensive tax preparation services including:

- ★ Foreign Tax Credits
- ★ Foreign Earned Income Exclusion
- ★ Foreign Trust reporting required for your RESP's and TFSA's
- ★ Special reporting in regards to Canadian Mutual Funds (Passive Foreign Investment Companies)
- ★ Tax Treaty benefits
- ★ Compliance requirements

**Contact AET today to set up an appointment with an AET specialist to help guide you through your complex tax situation.**

### Meeting your expectations:

- ★ An associate will contact you within 48 hours by telephone or Skype
- ★ Up Front Pricing – no surprises
- ★ Safe and Secure sharing of documents and information through your own online portal
- ★ Secure payment methods - E-transfer and all major credit cards accepted
- ★ Option to E-file your return (if eligible)
- ★ Year Round Service
- ★ Audit Assistance

### **Contact Us**

PH: 1-888-243-9992

Fax: 1-888-958-2367

[info@amexpattax.com](mailto:info@amexpattax.com)

[www.amexpattax.com](http://www.amexpattax.com)



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### **What you can expect**

- ✦ You will be contacted within 48 hours of AET receiving your contact information to schedule an appointment with an AET Cross Border Specialist
- ✦ During your appointment, a thorough interview will be conducted by an AET Cross Border Specialist by telephone or Skype. Any questions you have regarding cross border tax and compliance issues will be addressed at this time.
- ✦ An up-front fee estimate. No work will be done before you agree to the price
- ✦ You will receive an Engagement letter spelling out exactly what you have contracted AET to do
- ✦ A personal portal can be provided, at no additional charge, for the secure transfer of documents and information between yourself, anyone else you choose to include, and your AET Cross Border Specialist
- ✦ Complete and accurate preparation of required return(s) and/or informational filing(s)
- ✦ Payment Options –We accept E-transfers and all major credit cards
- ✦ E-filing services when applicable or printed copies to be signed and mailed by you
- ✦ A copy of your return(s) and/or informational filing(s) for your records
- ✦ Year round services to respond to correspondence and inquiries from you or any authorities in regards to any return(s) and/or informational filing(s) prepared
- ✦ Audit assistance

### **You will provide:**

- ✦ A signed engagement letter with a deposit equal to one half of the estimated fee
- ✦ Any information required to complete your returns and filings
- ✦ Payment for the balance of your estimated fee prior to the completion of the service

**All communication and document sharing will be facilitated through email, telephone, Skype and the use of your online portal. We strive to offer safe and secure transfer of all information throughout this process.**

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