

Our Top 10 Tips to Resolve Your Tax Matter & Reduce Your Legal Fees

By Peter Aprile

We want to deliver great results and provide cost-effective legal services. In order to meet these goals, we need to work together. We understand that you expect us to competently, professionally and relentlessly represent your interests. We expect you to actively participate in your tax matter and cooperate with our firm. It is a two-way relationship. We have developed the following tips to let you know a little about us, to help you understand how to efficiently work with our firm, and to increase our chances to favourably resolve your tax matter.

1. Learn about your issue and understand that the process requires patience.

We have published a series of articles on our website and [blog](#) explaining the tax dispute and tax litigation process. We hope that these articles help you understand the parties, the process, and establish reasonable expectations. In addition, we will explain the steps that are involved and the timeline toward resolution. It is important that you understand that dealing with the Canada Revenue Agency (CRA) takes time and patience. At times, your file will require a flurry of work. At other times, we will need to wait for the CRA. Understand the process and be patient.

2. Trust that we are really good at communicating with our clients.

First, we will send you all correspondence and submissions that we send and receive. Second, your invoices will contain a complete and detailed listing of the work performed on the file. Third, we will call and email you when something important occurs or when we need your input. Fourth, we will provide you with monthly progress reports on or around the second Friday of every month listing what has happened in the last 30 days, what we expect to happen in the next 30 days, and the date we will send our next monthly progress report. Lastly, if you have questions, you can book a meeting with us quickly using our online scheduling system.

3. Help us help you.

Ask us whether you can help—and if you can, we'll help you understand how and when.

4. Create a chronology of events.

In most cases, we create a chronological list or timeline of our clients' relevant facts and documents. We recommend that you take some time and create a chronological list or timeline. This way, you can help us quickly understand the relevant events and we can use our time to explore additional facts, gather evidence, and develop our theory of your case.

5. Organize your documents and use our firm's style guidelines.

Our office is paperless. Please send your documents to our firm using email. In addition, we ask that you use our firm's style [guidelines](#). If your information and documents are categorized and indexed, we will spend less time sorting through your information.

6. Respond promptly to our questions.

We will ask you to return phone calls, sign documents, approve draft submissions, gather information, send documents to our firm, and provide formal instructions. It is important that you respond promptly and provide complete answers. Delays tend to increase costs, impede momentum, cause frustration, impact our ability to protect your legal rights, and may reduce our ability to achieve the best result. If you anticipate some delay in providing a response or gathering documents, let us know and provide regular status updates.

7. Make sure our interactions and meetings count.

First, we strongly recommend that you write down any questions and issues you would like to discuss. Second, we recommend that you identify the appropriate team member with whom you would like to correspond. Third, choose the most appropriate mode of communication *e.g.*, email, phone, Skype, or in-person meeting. If phone, Skype, or in-person meeting is preferred, we recommend that you send your questions to us in advance of the meeting to ensure that your questions are addressed and so we can make the most of our meeting time. Fourth, you should have all relevant documents at your fingertips during phone or Skype meetings. Finally, it is always helpful if you have access to a computer during phone meetings.

8. Keep our firm and the CRA informed of any change in your contact information.

If you change your contact information, change your address on the CRA's main database. Do not assume that any CRA employee will update your contact information without a [formal request to change your contact information](#). In addition, call our firm's legal assistant and ask that your contact information is changed in our main database.

9. Do not assume that the CRA has sent us copies of the correspondence or documents that it has sent to you.

The CRA will refuse to send some important documents to our firm including, but not limited to, notices of reassessment and notices of confirmation. It is important that you provide us with copies of any correspondence and documents related to your matter within 5 days of

receipt. This way we can work to ensure that your legal rights are protected. If the CRA indicates that a copy has been sent to our firm, we recommend that you call a legal assistant to confirm that we have, in fact, received the copy.

10. Meet your obligations under your retainer agreement.

Your retainer agreement requires that you promptly pay any outstanding balance. If the retainer agreement is based on the hourly rate model, you are required to pay any outstanding balance and replenish your retainer deposit. In appropriate cases, we will accept monthly payment plans based on postdated cheques or pre-authorized credit card payments. However, our patience in chasing unpaid accounts is, at best, limited. If you do not meet your obligations under your retainer agreement, we will stop working on your file.