

GestionJC Inc.

Service Offering – Certificates of Compliance



GESTIONJC
COMPTABILITÉ / FISCALITÉ

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Summary

Firm

GestionJC Inc. is a tax and accounting firm led by an experienced tax specialist and accountant, specializing in personal income tax for individuals, real estate investors, and non-residents.

Objectives

- With our service offering for certificates of compliance / disposition, our objectives are to:
- provide you with peace of mind by taking charge of the entire process (analysis, forms, correspondence with the Canada Revenue Agency (CRA) and Revenu Québec);

Mission Statement

- Our mission is to support our clients at every stage in the life of their significant assets, particularly at the time of sale or disposition.
- We aim to establish a relationship of trust and confidentiality, to thoroughly analyze the transaction (sale price, acquisition cost, improvements, expenses, residency context, tax treaties, etc.), to prepare and file strong, complete, and defensible applications for certificates of compliance, and to ensure that deadlines and documentation requirements are met for a smooth transaction.

Key Success Factors

The success of a certificate of compliance file depends on a rigorous analysis of the transaction, an accurate calculation of the estimated tax, and complete documentation.

At GestionJC Inc., this translates into deep expertise in real estate and non-resident taxation, a structured approach (diagnosis, calculations, forms, follow-up), continuous client communication, and a results-driven focus: minimizing unnecessary withholding and securing the transaction.

Services

We offer the following services for your certificates of compliance / disposition needs:

- preliminary analysis of the situation: review of the transaction (type of property, sale price, acquisition cost, improvements, fees, ownership structure), verification of residency or non-residency status and tax implications, identification of required forms (federal and provincial);
- preparation and filing of applications for certificates of compliance: preparation of federal and provincial forms, calculation of estimated capital gains (or losses) and tax payable, preparation of schedules and supporting documents (calculation worksheets, supporting documentation, explanations);
- follow-up and coordination with tax authorities: proactive follow-up with the CRA and Revenu Québec until the certificates are issued, management of requests for additional information and clarification of file elements, collaboration as needed with the notary, the purchaser, or other stakeholders;
- logistics and administrative support: sending documents by mail or electronically as required, up to 3 follow-ups with tax authorities (federal and provincial), delivery of obtained certificates and explanation of their impacts for the client.

Pricing

We primarily bill based on the hourly rates of the professionals assigned to your file, with the following minimums:

- \$1,200 + taxes for an individual;
- \$2,200 + taxes for a couple.

Payment Terms

Initial retainer: **\$700** (individual) or **\$1,000** (couple), due upon acceptance of the service offering and before work begins.

Additional amounts may be required during the engagement depending on the progress of the work, the actual complexity of the file, and exchanges with the tax authorities.