

GestionJC Inc.

Service Offering - Individuals



GESTIONJC
COMPTABILITÉ / FISCALITÉ

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1. Executive Summary

Firm

GestionJC is an accounting and tax firm that supports individuals, families and investors who are looking for more than simple tax-return preparation.

We provide a full advisory service—structured and proactive—to help you protect your assets and sustainably optimize your tax position.

Objectives

With **GestionJC**, our objectives are clear:

- Give you true peace of mind: we manage your tax matters end-to-end, including support in the event of an audit.
- Maximize your after-tax outcome: through an in-depth analysis of your situation (income, investments, real estate, residency status).
- Secure your compliance: by preventing costly errors, missed forms, and misinterpretations of tax rules.
- Build a lasting relationship: we become your year-round tax reference, not just a seasonal “service counter”.

Mission Statement

Our mission is to combine technical expertise with a human approach to:

- Build, with each client, a relationship of trust based on competence, transparency, and education.
- **Make complex situations easy to understand** (real estate, international, non-residents, self-employment, crypto, etc.).
- Help our clients **make better tax and financial decisions**, today and for the years ahead, so they can keep growing.

Key Success Factors

What sets **GestionJC** apart:

- In-depth expertise in personal tax, including international mobility, built through many real-world files real cases;
- Clear and structured communication: we explain choices, impacts, risks and opportunities in plain language;
- A “tax concierge” approach: you have access to a tax specialist for your questions, including after tax season ;
- Results-driven processes: optimization, audit-readiness, and a focus on your situation—not just data entry into forms..

2. Tax Services – Returns

Tax Returns – Our Approach

For over 10 years, we have supported taxpayers in Quebec, across Canada and abroad with the **end-to-end management of their personal tax obligations**.

Our differentiation rests on three pillars:

1. **Transparency**: clear packages, taxes included, with no hidden fees.
2. **Proactivity**: we anticipate the tax impact of your decisions (buying/selling property, leaving Canada, foreign investments, etc.).
3. **Quality of information**: you understand what we do, why we do it, and how it protects you or helps you save.

Tax Returns – Client Profiles We Serve

1) Tax Returns – Essential Profile

For individuals, couples or families with mainly employment income and a few tax slips (T4, T5, T2202, RRSP, childcare expenses, etc.).

Even when these returns seem “simple”, we:

- systematically review all available credits and deductions;
- run the most advantageous household scenarios;
- suggest concrete actions to improve your situation starting next year.

Goal: obtain the best possible outcome **in full compliance**, without you having to worry about the details.

2) Tax Returns – Advanced Profile

For situations that require a higher level of analysis:

- Self-employed, consultant, independent professional (with or without GST/QST);
- Residential or commercial rental income in Canada;
- Foreign income and assets (bank accounts, investments, real estate, etc.);
- Employment expenses (T2200), home office, vehicle, etc.

These files often require:

- smart structuring of expenses;
- understanding complex interactions (GST/QST, CCA, tax treaties, elections 45(2)/45(3), etc.);
- annual **tax planning**, not just return preparation.

Our role: **simplify complexity, optimize your net result, and secure your tax choices.**

3) Tax Returns – Complex / Strategic Profile

For taxpayers facing advanced issues:

- Canadian non-residents (rental income, pensions, withholding, and elections s.216/217);
- Leaving or arriving in Canada (emigration/immigration, permanent departure, departure tax);
- Significant foreign income and double-taxation management;
- Real estate sales with special histories (mixed use, change in use, tax elections);
- Files involving multiple entities, countries, or technical forms.

In these situations, GestionJC:

- acts as a **strategic partner** rather than just a tax preparer;
- identifies risks (penalties, excessive withholding, loss of credits, etc.) and reduces them;
- supports you in case of CRA/RQ correspondence or audit.

You receive a “family-office level” tax service, tailored to your reality and your issues.

3. Consultations

Strategic Tax Consultations

Our first mission is to help you make better decisions before it's too late.

Our consultations allow you to:

- clarify the tax impact of a project (buying/selling real estate, incorporation, leaving Canada, investing abroad);
- validate your choices as a self-employed individual (structure, expense choices, GST/QST, RRSP vs TFSA, etc.);
- review your rental-income strategies (effective tax rates, CCA, financing, ownership structure);
- prepare for a transition year (leaving/returning to Canada, change of residency status, retirement, etc.).

We have already supported hundreds of taxpayers and turned situations perceived as complex into a clear, controlled action plan.

Consultations are available stand-alone or integrated into our service packages, so you can decide with full information.

4. Training

Personalized Training — Become autonomous, with an expert in the background

Some people want to file their own taxes themselves, but **don't want to take that risk without a safety net.**

GestionJC offers training that is:

- **tailored to your reality** (student, self-employed, real estate investor, individual with an investment portfolio, etc.);
- based on the **tax software you use** (TurboTax, ImpôtExpert, etc.);
- supplemented with the **main annual tax updates**, explained in plain language and applied to your case.

The goal is not to turn you into a tax specialist, but to:

- give you the right reflexes;
- help you avoid common mistakes;
- help you know **when an expert becomes necessary** (and be able to come back to us at the right time).

Choosing GestionJC means having the freedom to:

- be supported end-to-end;
- or build your skills, with a firm that remains available as backup.

5. Price List

Our Packages

Price per person, taxes included**.

Essential | \$229 / person

Ideal for employees/retirees with no complex tax situation.

- Up to 10 tax slips included (T4/RL-1, etc.)
- Filing with CRA & RQ
- Tax concierge: 30 min

Self-Employed | \$499 / person

Target profile: self-employed, consultant, independent professional, freelancer.

Includes the Essential package, plus:

- Self-employed income (1 schedule)
- GST/QST filing
- Expense optimization
- Home office expenses
- Annual tax planning
- 5 additional tax slips
- Tax concierge: 1 hour
- CRA/RQ audit protection

Real Estate Investor (Canada) | \$499 / person

Target profile: Canadian resident owning a residential or mixed-use rental property located in Canada (one property included).

- Includes the Essential package, plus:
- 1 rental property (additional property: \$179)
- \$20 surcharge per RL-31 slip to be filed (first one included)
- Capital gains (sale of principal residence, secondary residence or rental property)
- Change in use (elections 45(2) ITA, 45(3) ITA)
- Tax concierge: 1 hour
- CRA/RQ audit protection

International Investor | \$599 / person

Target profile: Canadian resident with foreign assets or income (investments, bank accounts, rental properties, etc.).

Includes the Essential package, plus:

- 1 T1135 or T1161 form
- Foreign income (employment, dividends and interest)
- Filing with CRA & RQ
- Tax concierge: 1 hour
- CRA/RQ audit protection

Prestige (multi-complex profiles) | \$799 / person

Target profile: individual with at least two complex situations (e.g., self-employed and rental property; property in Canada and abroad; international investor and rental property; non-resident with multiple income sources, etc.).

- 2 rental properties included (additional property: \$179)
- \$20 surcharge per RL-31 slip to be filed (first RL-31 included)
- Self-employed (1 schedule included)

Non-Resident | \$699 / person

Target profile: individual living abroad (non-resident of Canada) with Canadian-source income.

- Includes the base service
- 2 slips included:
 - Reporting Canadian investments (up to 3 portfolios)
 - Rental income per address (additional property: \$179)
 - \$20 surcharge per RL-31 slip to be filed
- Pension income (s. 217)
- NR4 request
- Government follow-up
- Filing with CRA & RQ
- Tax concierge: 1 hour
- CRA/RQ audit protection

Discounts (stackable)

Loyalty (from the second year): \$100 off the total invoice

À la carte options & services

Express service — delivery within 4 business days (standard: 2 weeks).

Other available add-ons (added to the selected package if applicable) | / person

| | |
|------------------------------------|-------------|
| Moving expenses | \$94.99 |
| Employment expenses | \$179.99 |
| Arrival to / departure from Canada | \$36.99 |
| Post-bankruptcy | \$303.99 |
| Deceased return | \$212.99 |
| Sale of principal residence | \$29.99 |
| Sale of secondary residence | \$59.99 |
| Cryptocurrency transactions | Hourly rate |

Need a custom quote?

Can't find the right fit?

For a complex case, we can prepare a tailor-made quote.