

Tax Preparation



# Tax Professionals First!

## For Over 40 Years

- Personal Returns
- Corporate Returns
- Trust Returns

## We're not only about taxes

### Why Roche?

We've been serving the tax needs of ordinary people for over 40 years and have taken hundreds of clients through CRA audits and appeals. Our work stands the test of audit because we know how to document your expenses so that your entitlement to claim can be proven.

Tax strategies are very important to you because they are several ways to file returns. Only one way is best for you however. Many tax preparers are not accustomed to interpreting your circumstances to your advantage. That's where experience comes into play.

Personal returns which include income from property (real estate, stocks, mutual funds, bonds) and the related potential capital gains and losses also include returns for employed persons, self employed tradesmen, hairdressers, professionals such as veterinarians, lawyers, dentists, optometrists and commissioned sales representatives and truckers.

Our work includes the preparation of all the necessary financial statements, employment expense accounting, trip summaries and more. Our own forms compliment CRA forms to ensure that you can withstand an audit.

With all we offer, our tax preparation service fees are competitive with any other professional taxation firm.

When the tax return is complete we look at your complete financial picture. How you're managing your cash, debts, taxes and risks at no additional cost.

**Roche**  
TAXATION AND ACCOUNTING

## Organizing Your Financial Affairs



# It's all About

- Planning
- Implementation
- Follow up

Included in our competitive fee for preparing your tax return we offer the complete financial services listed below.

## The Six Step Process

We Work With You

Your current situation.

- We gather information about your:
  - Assets
  - Liabilities
  - Your Tax situation
  - Debt Structure
  - Cash Flow
- A schedule of your cost of lifestyle.
  - At present
  - If you die
  - If you retire
  - If you become disabled
- We identify the problems facing you in achieving your goals. Getting you from where you are to where you want to be.
- We develop solutions to the problems - which may involve budgeting, debt restructure, risk management, saving strategies, investment strategies.

- We implement the solutions with your consent.
- We stay with you year after year, constantly reviewing your progress and helping to ensure you stay on course.

The consolidation of the provision of accounting, taxation, financial planning and implementation of the recommended solutions provided by a financial plan under one roof through one office with all of the related professionals exclusively connected to **The Roche Financial Group** is unique in the industry.

The Total Toolbox Solution



# Cloud Business Management Systems and Procedures For Your Business

Fully Computerized cloud Systems and Procedures for managing cash and processing quotes, billing, material purchasing, payroll, job costs, paying suppliers and employees in **REAL TIME FROM ANYWHERE**. Your accounting records and all the information you need to run a profitable business available to you on your ipad, iphone or laptop **FROM** anywhere in **REAL TIME**.

The **DREADED** bookkeeping process is a fully computerized, automatic by product of your business management procedures. Manage your receivables, pay your suppliers, employees, your bank account with a few

clicks of your mouse.

Optional inclusions are Corporate and Personal Tax Services, our personal financial planning services, custom employee benefits and group retirement savings plans.

**YOUR BUSINESS HAS STRUCTURE, CAN MORE EASILY OPERATE IF YOU BECOME ILL, IS SALEABLE IN THE EVENT OF YOUR DISABILITY OR PREMATURE DEATH.**

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for the office nearest you.

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