

Virtual supported tax filing

Sample disclaimer statement

This disclaimer statement was shared by WoodGreen Community Services and is provided as an example.

I have a few statements that I am required to read to you. Your acknowledgement and consent is required before we proceed with completing your tax return today.

Service delivery

Our virtual supported tax filing services are provided by a trained team of staff, students and volunteers. I am not a certified accountant, and I do not work for the Canada Revenue Agency. In coaching you to complete your tax return remotely, the method that we use to communicate may not be secure. While all reasonable efforts have been made to ensure that your personal information is protected during the course of our communications, we cannot guarantee this.

We will assist you based on the information that you provide. It is your responsibility to ensure that the information you input into the TurboTax Software is accurate and complete. **[Community agency name]** reserves the right to refuse service if we feel your financial situation is beyond our capabilities.

Client privacy

You understand that **[Community agency name]** keeps some records from all tax appointments on computer and in paper files. Client information is kept confidential, but there are times when **[Community agency name]** may be required or permitted, by law, to release information.

You may contact our Privacy Officer directly at **[phone number]** or at **[email address]**.

Outreach

You understand that staff from **[Community agency name]** may contact you at a later date to offer you information on additional benefits, services or opportunities that may become available.

Waiver

You hereby waive **[Community agency name]**, its volunteers and employees from any and all liability with respect to any injury, loss, or damage to personal property associated with activities participated in respect of the **[name of tax clinic or community program operating the clinic]**. The undersigned agrees to hold countless **[Community agency name]** for any loss or damage that may occur during the sessions.

Having been read the preceding statements, please acknowledge that you understand and accept all of the information above and you consent to me completing your income tax return.

Client provided verbal consent and acknowledges that they (and their spouse/common-law partner, if applicable) understand and accept all of the information above.