

# Money

## MATTERS



COLBY•STECKLY  
CHARTERED PROFESSIONAL ACCOUNTANTS



## INTERACT WITH US ELECTRONICALLY!

### Portal Scheduling

Additionally, with the Portal you can now book appointments online quickly and easily at a time that works best for you. All you have to do is go to the Schedule tab and select the partner, date, and time that you want the appointment for and it automatically sends us your meeting request. Once the meeting has been approved you will receive another email confirming your appointment, and that's it!

If you don't already have a portal account set up or would like more detailed instructions, you can call our office and have our lovely administrator, Renee, set you up.

### E-transfers

For some time we have accepted e-transfers as payment, but did you know that we can now request them as well? An e-transfer request is an effortless way of sending us a payment without having to set us up as a payee in your online banking. Once we send the request, all you have to do is log in and select the account to send the e-transfer from. If you would like to set up e-transfer requests for any or all of your invoices, please contact us and we will be happy to get that set up for you.

### Portal Documents

As some of you may know, we have an online Client Portal that allows us to transfer sensitive documents back and forth with our clients. The safety of your data and information is very important to us, and the Portal provides a much more secure way to send and receive documents than email. Simply go to the Documents tab in the Portal, click the Upload File button, select the files to upload and the Folder (if applicable) and submit. It's that easy!

*Visit us in our NEW office located at:*

Magrath Business Centre #204, 14127 - 23 Ave NW  
Edmonton, AB T6R 0G4

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# DID YOU KNOW?

Alberta Treasury Board and Finance, to whom we pay our provincial corporate taxes, has updated their system! You may have noticed that you are no longer able to pay them as a registered payee under your bill payments. This is because there is a tax payments and filings subsystem specifically for making these payments.



## E-payment

### Payments & Transfers

#### My Payments and Transfers

- Make a Payment
- Make a Transfer
- My Payment History
- My Transfer History
- My Session History
- Investigate a Bill Payment
- Manage Payees
- Add a Payee

#### Interac e-Transfers

#### Tax Payment & Filing

#### epost - View Bills

If you are making a payment for the first time you can use this video <http://tra.alberta.ca/making-payments> to walk you through the process.

Need to confirm your account number? Need help with getting set up? Contact us, we are always happy to help!

## Do you use PayPal to receive payments in your business?

In recent news, PayPal has received a Federal Court order to provide information to CRA about all PayPal Business accounts that have had activity between January 1, 2014 and November 10, 2017. Here are a few items CRA will be reviewing: the full names of account holders, addresses, date of birth, business name, phone numbers, email addresses, SIN or Business Number. The transaction information being obtained by CRA consists of the total number and dollar value of all transactions received and sent through the account for this period.

If you or someone you know has not included revenue from a PayPal business account on their personal or corporate tax returns, now is the time to make it right. Contact our office to meet with one of the partners to review your options.



## Help us help those in need!

**The Mustard Seed** is a wonderful local non-profit that builds hope and wellbeing for our most vulnerable citizens. They have been helping the homeless in Alberta since the '80s, and continue to grow each year.

If you would like to help us support The Mustard Seed and build backpacks of hope for those in need, you can drop off items on the list below at our office **before December 17** and we will happily build and deliver them to The Mustard Seed on your behalf.

- Wool/thermal socks
- Gloves, toque & scarf
- Toilet paper
- Bus tickets
- Deodorant
- Soap
- Neck warmers
- Travel toothbrush & toothpaste
- Small warm blanket
- \$5 coffee gift card
- Emergency candle & matches
- Pocket hand warmers
- Lip balm

**Have questions? Feel free to get in touch!**