

The Bean Counters' Quarterly

Steve Kirkham C.A. Professional Corporation

December 2015

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Greetings!

Welcome to the December 2015 issue of TheBean Counters' Quarterly!

I hope you've had a wonderful holiday time.

This time of year is often a busy time, with many family events and/or activities, but I encourage you to take some time to reflect on the year just finishing and look at the year about to begin. What lessons or plans are you bringing with you? What do you hope to do with this year ahead? In the Dialogue section you'll hear from Sherry about her outlook on how to greet the new year!

Also please see the About US section to see what the whole team has going on. In this issue please make sure to read the introduction about our newest team member, Derek.

On behalf of the team at Kirkham CA's, we would like to wish you peace, joy, love, and good health at his holiday time and throughout 2016!

Best regards,

Steve Kirkham

The Dialogue Department!

The idea is to open the lines of communication on a topic or question that may be light and breezy or deep and serious, in an otherwise busy and hurried world. We'll start on our end by telling you about our thoughts on a particular topic or question, and then we'll wait to hear back from you - just hit the link "Here's What I Have to Say" and send us a quick reply.

Here's our question/topic for this issue:

"What is your approach to welcome a new year? Do you set goals or resolutions, or do you prefer to avoid that type of approach?"

Our reply for this quarter is from **SHERRY SKIPPEN**: *"Being in the accounting field doing taxes, January to May is a busy time for us. So, I don't like to set goals or resolutions because I'm concentrating on getting tax returns filed. I've tried to do the fitness thing and the diet thing but those never work. Those*

leftover chocolates from Christmas are too tempting and working out is so much work. So, I just try to maintain a healthy balance all year long. So far it's working."

Here's What I Have To Say - (send reply to) steve@kirkhamca.ca

Inaccurate Advice From CRA "Unacceptable"

Inaccurate Advice From CRA "Unacceptable" says Minister

CTV News Group Published March 3, 2015

The minister in charge of the Canada Revenue Agency says it is "unacceptable" that one in four business owners who sought tax advice from the agency's call centres got incorrect information.

An internal survey conducted in late 2013 showed that 25 per cent of business inquiries were incorrectly answered by CRA agents. Those findings were even worse than reports issued by the Canadian Federation of Independent Business, which poorly rated the CRA's call centre.

"These results are unacceptable," Minister of National Revenue Kerry-Lynne Findlay said Tuesday in an email statement to CTV News.

Liberal deputy leader Ralph Goodale speaks with CTV News. "When Canadian individuals and businesses contact the Canada Revenue Agency, we expect them to be provided with correct information." Findlay added that her department has implemented "several measures to improve the quality of services offered by the CRA." Her office reiterated a number of initiatives, including a requirement that call agents provide their ID numbers and the option to use a mobile app or make a tax inquiry in writing.

In a statement, a spokesperson for the agency said the CRA conducts "regular and ongoing monitoring of the accuracy of call agent responses." Philippe Brideau said each call centre agent is monitored six times each quarter for quality and accuracy. But since reporting on the results of the CRA's accuracy audit, CTV News has heard from many individual taxpayers who say they've been given incorrect information and bad advice, or left unable to reach a live agent on the phone.

Among them is Allan Cox of London, Ont., who said the CRA owes him thousands of dollars, but the matter is in dispute and he hasn't seen any of the money. He said he has been trying to rectify the problem for two years, with no luck.

"When you talk to person A, you get one answer, you talk to person B you get another answer, you talk to person C, you get another answer," he told CTV News.

The CRA handles about 3.3 million business inquiries per year. In 2013-14, it handled 14 million calls from individual taxpayers.

The CRA says only eight per cent of those individual inquiries were answered incorrectly. But tax experts dispute that number. "I think the CRA needs to think very seriously if it wants to keep providing advice if it doesn't have confidence in the advice

it is giving," said Aaron Wudrick, the federal director of the Canadian Taxpayers Federation.

He said the real problem is that the Canadian tax code has become unreadable and unnecessarily complex. "Shouldn't be surprising that Canadians need to ask for help to do their taxes and furthermore, that the CRA itself would find it difficult to understand the tax code," he said.

Liberal deputy leader Ralph Goodale said another issue is the repeated government cutbacks at the CRA. "When you degrade the back office to the point where they can't even give good advice, then that has very immediate front-line consequences for taxpayers," he said.

The CRA said filing a formal complaint is always an option for taxpayers or businesses who believe they've been incorrectly advised. But the head of the Canadian Federation of Independent Business said that can backfire. "You raise your hand and then you are potentially the subject of an audit," Dan Kelly said.

The Office of Taxpayers' Ombudsman is another complaint mechanism.

[CTVNEWS](#)

Spotlight On New Team Member

SPOTLIGHT ON NEW TEAM MEMBER:

Derek Stevens

We would like to take this opportunity to announce the latest addition to the team - Derek Stevens. Derek brings over 20 years of audit and tax experience with him from another small firm environment. In fact Derek and Steve both got their start in the same small firm and have worked together in various forms dating all the way back to 1991. Living in Toronto, Derek will spend most of his time at client locations throughout the GTA and is always happy to make a visit to your office. The team very much looks forward to working with Derek over the coming years and we hope our clients will find he provides a high level of attention to detail and client service. Welcome Derek.

Recommended Reading:

Getting There: A Book of Mentors

by Gillian Zoe Segal

The path to success is rarely easy or direct, and good mentors are hard to find. In *Getting There*, thirty leaders in diverse fields share their secrets to navigating the rocky road to the top. In an honest, direct, and engaging way, these role models describe the obstacles they faced, the setbacks they endured, and the vital lessons they learned. They dispense not only essential and practical career advice, but also priceless wisdom applicable to life in general. *Getting There* is for everyone—from students contemplating

their futures to the vast majority of us facing challenges or seeking to reach our potential.

[Getting There: A Book of Mentors](#)

Stuff To Know About Our Team

-Sherry says that she has really enjoyed the weather these last couple of months. Walking the dogs and doing her fitness workouts outside has been a lot easier with the mild temperatures. She and her husband enjoyed putting up an early Christmas tree up and decorations were scattered throughout the house. She also got a lot of her Christmas shopping done by December 1st so was coasting throughout December without any panic and even sent a few Christmas packages out west for her family in good time before the holiday. Sherry says - "it's been a good year!"

-Linda says the family is growing older so, sadly, the holiday traditions have evolved to suit the change. While it is still a time of excitement, the times spent together are becoming the focal point more so now that they all live apart for most of the year. Still looking forward to the holidays but really hoping for SNOW. Snowshoeing and cross country skiing require the white stuff. She's hoping to get in some winter activity this Christmas.

-Ana says a lot has happened over the last year. Some of these events have been good - new job (thank you Steve), 2 weddings (not hers), new baby (again, not hers) & some not so good - like the passing of some family, friends & long time clients (all of them will all be missed). Ana is looking forward to the coming year and hopes that it is full of good things for all. Best of luck to everyone.

-Andre says this has been a busy fall for him. First of all he's glad that Derek joined the firm and they car pooled to Kitchener and Oakville. In the past he had several opportunities to work together with him and says he is really a resourceful and inspiring teammate on audits. It has been a mild fall this year, so he's had some chances to play soccer outdoor on the weekends in late November and early December, which was really a record for their neighborhood, as usually the field was too stiff for playing soccer in Nov- he thinks it is good for their playing but could be a bad sign of global warming! Besides soccer, he had most of his professional developments courses in Nov this year, and was updated in several areas, such as condo audit, high-risk areas in personal taxes and corporate taxes, etc. For his kids, they curled every week-end. On Dec 15th, both of them played in the concert in their school. William played trombone and Martina played violin.

-Derek says, in his very first contribution to the BCQ, that he better mention the biggest change this year for him, that he joined the SKCA team after almost 25 years at the same CA firm previously. It's now new scenery with some old friends, too bad he missed out on the gold watch though. His daughter, Paige, is enjoying grade 1 French immersion. She can already read in French better than he can but he says that's not really saying much. His wife, Laura, is taking full advantage of her time away from the corporate world and has been volunteering at the North York Harvest food bank and on the parents' council at Paige's school. There was a get-together with the extended family on Dec 27th and the annual Stevens' family Goldschlager shots. Derek says you should give it a try. It's delish. He and his family are all looking forward to some time on the slopes - and says 'let's get this winter started baby!'

-Steve says that once again, another blur of 3 months have passed thru the Kirkham house (not to mention the time of the season causing a speed up in time!). No complaining about the current state of the weather, but pretty sure we'll get hit with a good old Canadian winter in the New Year (and take advantage of some of the great

outdoor things that has to offer). A year ago at this time they were all sitting on a nice hot beach but this year it's back to a family Christmas season spending time at Steve's sister's annual event, another sister for xmas day, and then off to Sherry's sister's for boxing day (what would we do without sisters???). The kids are obviously excited and getting ready for the big day. Unfortunately Sherry is battling a case of "shingles" (no, not just for the "elderly"!), hoping that will be all cleared up for the festivities of the season. But, she has somehow managed to maintain her otherwise hectic schedule of coaching, volunteering and of course, Christmas shopping. Erin wraps up exams on Dec 22 and still hoping to land a co-op job for January (she has an 8-month placement to find, then one more Fall semester and she's done). Justin is just in the process of thinking toward next year and the trek off to university. Even with a 90+ in accounting, it's not looking like he'll follow directly in dad's path, but will likely be in some form of business. Gavin played on the volleyball team this year (much to dad's pleasure!). He's in the midst of tryouts for the basketball team (if only that somehow tied in to laying in bed with an iPad, he'd be a pro). That's it for now, all the best to everyone over the holidays and into the New Year.

Quick Links...

- [The Bean Counters' Quarterly Home Website](#)
- [Canada Revenue Agency - for Business](#)
- [More About Steve Kirkham C.A. and Our Team](#)
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email: steve@kirkhamca.ca
phone: 647-723-6195
web: <http://www.kirkhamca.ca>

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