



WILLINGTON MARTIN CPAs

Professional Corporation
Independent Member Firm of



Porter Hétu International
Professional Services Group

2016 PERSONAL TAX PROCESS

Our team of Theresa, Michael, Marilyn, Rose, and Jabrille will be working on your returns this year. We look forward to assisting you through the process as pleasantly and quickly as possible. The information below will give you with a quick refresher of our tax process.

SEND US YOUR INFORMATION

We enclose a checklist to assist you with gathering your tax materials. The checklist highlights some new items added due to tax changes in the year. We ask that review the checklist and return a completed copy with your materials. We appreciate the time you take for this important step.

For fastest turnaround, send us **all** your materials at once. Some T3 slips may not be issued until the end of March! We will accept your materials by mail, courier, hand delivery or electronically. If you find you need to send us additional material later, email or phone to let us know, and then send us the information as soon as you can.

If you use the mail, please phone Marilyn at 416-848-1585 to confirm our receipt of your package. We recommend Canada Post's Xpresspost service. Scanned electronic materials can be sent via email or uploaded using your login and password. If you don't have a login or password, or don't recall the details, just ask. If you plan to visit in person, our website includes a handy map under 'Contact us'. Our office is open from 8:30 until 5:00 and Jamie at reception is ready to receive your package. Outside of these hours, call ahead to make arrangements for a drop off. If you need to book an appointment to review your source material or your completed tax return in person, please call Theresa or Michael.

INFORMATION CHANGES

Your contact information and previous choice of tax return report format will remain in place unless you tell us otherwise. If you have any changes, access the "Tax Resource Centre" tab on our website and submit any changes using the "Online Information Change Form".

PAPERLESS TAX RETURNS

You are likely familiar with our paperless process. We'd like to remind you that the pdf copy of your tax return can be printed if you wish and will contain your tax return and all the information we used to prepare it. We suggest you save it on a USB stick or external memory drive in a safe and secure location. Electronic records in PDF form are endorsed by CRA.

Professional Strength Personal Service Practical Solutions

30 Via Renzo Drive, Suite 200, Richmond Hill, Ontario, Canada L4S 0B8
Phone: (416) 848-1585 Fax: (866) 790-3095 Website: www.inbalance.org

REVIEW YOUR RETURN

When your tax return is complete we will send an email with the tax return attached **or** an indication that it is ready for you to download. If you have any questions or comments after reviewing the return, email or call us. If changes are necessary, we can revise your return at that time.

FINAL STEPS – AUTHORIZING, PAYMENT AND FILING

When you have thoroughly reviewed your return and are ready to file, you will need to do two things: authorize us to efile and settle your account with us. We will send you both a T183 efile authorization form and our invoice with your tax return.

To authorize us to efile on your behalf, sign the T183 efile authorization and return it to us.

To settle your account, a quick and easy way to pay us is by an interac etransfer directly from your banking website. If you prefer to use a credit card, follow the PayPal link on your emailed invoice. We continue to accept cheques if that is your preference.


We will then file your return electronically with CRA.

YOUR ACCOUNT WITH CRA

Your refund will be deposited into your bank account by CRA, in roughly 10 working days if you currently have direct deposit. If you wish to setup direct deposit visit CRA's website at: www.cra.gc.ca/directdeposit. CRA will mail a cheque to you in 4-6 weeks if you do not choose direct deposit.

If you owe tax, pay CRA directly using online banking, by mailing a cheque, or by visiting CRA's website at: www.cra.gc.ca/mypayment. All tax payments, whether online or by mail, are due in CRA's hands on or before April 30.

Please contact us if you need any help gathering your tax information. We are pleased to assist.



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