WILLINGTON MARTIN CPAs
Professional Corporation
Independent Member Firm of
Porter Hétu International
Professional Services Group

2020 PERSONAL TAX PROCESS

GATHER YOUR TAX DOCUMENTS

As we transition from a paper document world to an electronic one, we list some suggestions to assist you to organize your electronic tax documents if this is your method of choice.

- Electronic copies of your tax documents are often available from your bank, broker, employer, Service Canada (OAS, CPP, EI), and charitable organizations, among others. The documents can be uploaded easily to our web portal.
- If you receive paper documents and do not have access to a scanner, take a picture of the documents for your records and mail the original paper documents to us.
- Wherever possible the documents should be in ***pdf*** format. More time will be required to prepare your return when working with other formats (ie jpg, png, tif), for many reasons.

Note significant life changes may affect the documents you send us. Consider if any of the following circumstances apply to you. Starting university, marital status change, selling a home, new address, addition to the family, collecting CPP or RIF, starting a business, or a change in investment strategy.

We direct you to our Personal Tax Checklist as a general guide.

HOW TO SEND US YOUR TAX DOCUMENTS

Send us your tax documents using ***one of the two*** options below:

1. Electronic documents through our web-based portal at www.inbalance.org, Client Login.
   For security reasons we will ***NOT*** be accepting tax documents by **email or fax**.
2. Paper documents by mail, delivery, or in person at our offices.

Please use the method that is most convenient for you!

Web portal Our web portal is a secure and confidential direct transfer of documents from you to us or us to you. Send an email to reception@inbalance.org when your tax documents are uploaded or if you need a username and password to upload electronic documents to our web portal.

Mail/Courier If you are mailing tax documents, we recommend Canada Post's Xpresspost service with a signature and tracking.

Drop off **Note reduced hours:** If you are dropping off tax documents, reception is open between 10:00 am to 3:00 pm due to current COVID restrictions. Alicia at reception will accept your package. Our website includes a map under "Contact Us".

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

WHEN TO SEND US YOUR TAX DOCUMENTS

Send us your tax documents when you've gathered ALL your receipts.
If **T3**s are part of your tax documents, send us all your information in **early April** once you have received them. You will have a T3 if any of your investments are mutual funds or ETFs or you receive taxable income from an estate.
No T3s to wait for? Send us your tax documents as soon as you have everything.

ACTION ITEMS TO COMPLETE NOW

1. "MY ACCOUNT" WITH CRA

"My Account" offers many benefits to you as a taxpayer. Access to TFSA and RSP contribution room, Notices of Assessment, instalment balances and tax payment options are available along with other important information.
If you have not yet done so, set up "My Account" with CRA. Instructions are available on CRAs website. www.canada.ca/en/revenue-agency/services/e-services/e-services-individuals/account-individuals.html.

2. USERNAME AND PASSWORD FOR OUR WEB PORTAL

If you would like to provide us with electronic documents, send an email to reception@inbalance.org to request setup.

3. ARRANGE DIRECT DEPOSIT OF YOUR REFUND

If you wish to setup direct deposit visit CRA's website at: www.canada.ca/en/revenue-agency/services/about-canada-revenue-agency-cra/direct-deposit.html

4. ARRANGE TO PAY YOUR TAX AMOUNT DUE TO CRA BY PRE-AUTHORIZED DEBIT (PAD)

If you are interested and registered for "My Account", visit Accounts and payments and select the link "Manage pre-authorized debit".
If you are interested but not registered for "My Account", do the following:

- Click on 'CRA register" or "Continue to Sign-In Partner Login/Register" and follow the steps.
- This provides limited access to My Account, which will allow you to create a PAD right away by selecting the "Pay by pre-authorized debit" link on the left side bar.
- The CRA will send you your official access code by mail.
- Once you enter the access code into My Account you will have full access, which allows you to view, modify, cancel or skip a payment.

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, please let us know when you send your documents.

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

Willington Martin

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