



THE OAKMAN GROUP INC

— LICENSED INSOLVENCY TRUSTEE —

January 22, 2019

Dear Client;

RE: PREPARING 2018 INCOME TAX RETURNS.

As you will recall from our discussions prior to you filing for bankruptcy, as your Licensed Insolvency Trustee we are required to ensure the filing of the 2018 tax return (the year of bankruptcy) and the previous year if not completed already.

You will find enclosed a tax questionnaire which must be completed and returned to our office as soon as all information is obtained (all tax slips should be issued by February 28, 2019). **Please send the questionnaire and ALL of your slips to our office at the same time or your return may be filed incorrectly. If the information we receive is incomplete we will be sending back your information.**

Please be advised that 2018 tax returns must be filed with Canada Revenue Agency (CRA) by the April 30, 2019 deadline. **Therefore, all required information must be submitted to the office by March 29, 2019 to ensure timely filing of your returns and to ensure the uninterrupted payments of Child Tax Benefits and other such payments. Please note that your pension entitlement is determined by your tax return and if it is not filed by the deadline your pension will be interrupted.** If your return is received by our office after March 30, it will be prepared on a first come first serve basis.

The current year returns will be separated into a pre-bankruptcy (Jan. 1, 2018 to date of bankruptcy) and a post-bankruptcy (date of bankruptcy to December 31, 2018) return. If an amount is owed for the post-bankruptcy return, our office will contact you to advise you of the amount you are required to pay.

Assessments for bankruptcy returns do get processed a little later than regular returns so be advised that if you require a copy of your assessment, please be patient and contact our office in early June to see if it has been received.

If prior year returns are outstanding please provide the Licensed Insolvency Trustee with all required documents in order to file with CRA as soon as possible.

If you are self employed (i.e. No tax remitted to CRA by an employer), you are responsible for having both your pre and post-bankruptcy returns prepared. The Licensed Insolvency Trustee will be responsible for filing these returns. If you, or your tax preparer, have any questions, please contact our office.

Any questions or concerns please do not hesitate to contact our office.

Sincerely;
The Oakman Group Inc.
Licensed Insolvency Trustee

Per: Cathy Gianino

THE FOLLOWING FORM IS TO BE FILLED IN COMPLETELY FOR ALL APPLICABLE QUESTIONS.

GENERAL INFORMATION

1. Would you like us to give permission to Canada Revenue Agency to forward your information for use by Election Canada? YES \ NO

1a) Are you a Canadian Citizen? YES \ NO

2. Did you own or hold any foreign property at any time in 2018 with a total cost of more than \$100,000CDN? YES \ NO

3. Full Legal Name : _____ Social insurance No: _____

Current Mailing address: _____

Telephone No.: (home) _____ (work) _____ Date of Birth: _____
Day\month\year

4. Marital Status as of December 31: _____ If your marital status changed in 2018 please provide the date of change _____.

Day\month\year

Will you be making a claim for: HST: YES \ NO

Property or rent credit YES \ NO

(NOTE: only one spouse can make a claim for the above credits)

5. SPOUSE INFORMATION **(NOTE: Canada Revenue Agency requires this information in order to assess your return, your bankruptcy tax return will not affect the returns of your spouse)**

Spouse's full legal name: _____

Social insurance number: _____ date of birth: _____ net income: _____

Day\month\year

INCOME

6. Which company or companies did you work for in 2018?

(Please provide all T4 slips, T4A etc.)

Company Name Start Date\ Month End Date\Month

7. Did you receive Employment Insurance Benefits during the year? YES \ NO
 For what period FROM: _____ TO: _____
 (Attach your T4E slip)
8. Did you receive Canada Pension or Old Age Security benefits during the year? YES \ NO
 For what period FROM: _____ TO: _____ (Attach your information slip)
9. Did you receive Worker's Compensation payments, Social Assistance (Welfare, Disability, Mother's Allowance etc)? YES \ NO
 For what period FROM: _____ TO: _____
 (Attach your information slip(s))
10. Did you receive any child support and/or alimony in 2018? YES \ NO
 Alimony OR Child Support (circle one)
 Total amount received? _____ From: _____
11. Are you entitled to the Disability tax credit? YES \ NO
 (If eligible, Please provide copy of T2201)

DEDUCTIONS

12. If you paid rent and are claiming the rent payments, please provide the following information:
 (please provide receipts)

Name of landlord \ municipality	Address	Total \$ \ month	# of months

13. Who usually claims your children for tax purposes? ME \ MY SPOUSE
 If you claim your children, please provide the following information (NOTE: this section of your return will be used to process information required for your child tax credit)

Full legal name	Relationship	Date of Birth dd\mm\yy	Net Income

14. Did you make any child support payments in 2018? YES \ NO
(NOTE: if an agreement is in place, a copy of the agreement MUST be provided to include with your tax return)

If yes, please provide the name and address of the payee, along with the amount paid:

15. Did you pay union dues, which were not deducted by your employer? YES \ NO
For what period FROM: _____ TO: _____
(Attach your receipt)

16. Did you make any charitable donations other than through your employer? YES \ NO
(If yes please attach all donation receipts)

17. Did you have any medical expenses in 2018? YES \ NO
(If yes, please provide receipts.)

18. Were you a full \ part time student in the year? YES \ NO
(If yes, please enclose all tuition receipts and education deduction slips)

19. Should any other income or deductions be included in your return? YES \ NO
(If yes, please provide details)

**** If you are a commission salesperson or self-employed, you are responsible for having your return(s) prepared. Please have the individual preparing your return(s) contact Cathy Gianino at (905) 232-9355 if they have any questions ****