THE OAKMAN GROUP INC
Trustee in Bankruptcy

January 19, 2015

Dear Client;

RE: PREPARING 2014 INCOME TAX RETURNS.

As you will recall from our discussions prior to you filing for bankruptcy, as your trustee we are required to ensure the filing of the 2014 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 27, 2015). **Please send the questionnaire and ALL of your slips to our office at the same time or your return may be filed incorrectly.**

Please be advised that 2014 tax returns must be filed with Canada Revenue Agency (CRA) by the April 30, 2015 deadline. Therefore, **all required information must be submitted to the office by March 31, 2015** to ensure timely filing of your returns and to ensure the uninterrupted payments of Child Tax Benefits and other such payments.

The current year returns will be separated into a pre-bankruptcy (Jan. 1, 2014 to date of bankruptcy) and a post-bankruptcy (date of bankruptcy to December 31, 2014) 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.

If prior year returns are outstanding please provide 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 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 or visit our website to obtain another copy of this form at www.oakmangroup.com under frequently asked questions and resources.

Sincerely;
The Oakman Group Inc.
Trustee in Bankruptcy

Cathy Gianino

1125 Dundas Street East, Suite 218
Mississauga, ON L4Y 2C4

phone: 905-232-9355 fax: 905-232-9390
www.oakmangroup.com

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 2014 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. Present Marital Status: __________ If your marital status changed in 2013 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 2014?
   (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 2014? YES\ NO

    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 2014? 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:

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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 2014? 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)

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**** 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 ****

For copies of this form visit us on our website at www.oakmangroup.com under FAQ and resource page.