



PERSONAL STABILITY | BUSINESS FOUNDATION

Income Tax Preparation Process

On request Equilibrium Financial will examine your previous year tax returns to determine missed income tax savings. Our experienced staff will amend your tax returns and appropriately claim savings with Canada Revenue Agency (CRA). Equilibrium Financial has extensive experience with multiple year adjustments and working with CRA representatives to bring client's documentation up-to-date.

In our experience most clients feel a sense of awkwardness when filing for multiple outstanding years. Please know that Equilibrium Financial takes a collaborative role and our perspective is to meet your expectations and uphold your entitlements when dealing with CRA. We work for you!

Equilibrium Financial also has extensive experience of working with new business owners that have been overwhelmed with operating their businesses, and consequently the tax compliance and tax preparation was overlooked. We will work with you to ensure your statutory remittances, tax filings, and other pertinent documentation is caught up-to-date.

We will perform a detailed review of your current tax information and prepare your personal (T1), business (T2125), or corporate (T2) income tax returns. All work is performed with strategic view of reducing your tax obligations and accurate reflection of your personal and business activities. Equilibrium Financial has approach of demystifying the process and educating our clients in the nuances of their paperwork. In our experience, well-informed and educated clients are happy and wealthy clients.

Equilibrium Financial advocates a forward-looking approach. We encourage you to take advantage of our tax planning strategies and consult with us to leverage your future personal and business tax obligations.

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