



## TAX TIME

The 2022 tax season is upon us, and your Union Hall is still operating under COVID-19 protocols, therefore, we are still available to prepare all retired and active members' personal income taxes under the following conditions:

There will *not* be any scheduled appointments. Instead, please bring the necessary documentation to the Union Hall during business hours (we are open), and you will be contacted when your taxes are ready for pick-up.

If you participate in the My Shares program, please refer to the *Instruction Sheet* to print-off the necessary documentation to be included with your tax papers. If you do not have access to a printer, or require assistance with this process, please include your login information with your tax documents for the Union to login on your behalf to retrieve the required information.

We appreciate your understanding in keeping everyone safe and healthy.

**YOUR UNION AT WORK!**

## **Information Needed From Members to complete Taxes re: My Share**

Equateplus.com

Sign IN

### **Contributions & Purchases**

On Overview Page (first page you go to when you sign in)

Scroll down and click on button called "Plan Details" - near the end of the page

On left hand side under Purchase Cycles, click "See More"

Print or write down all information for 2021

Note: There will be two pages of information. You will need to click on the 2 on the right hand side to get the information for April and January of 2021

### **To Print:**

Right Click on the screen

Click on Print

Change the Layout to **LANDSCAPE**

**Make sure ALL OF THE COLUMNS ARE VISIBLE - If they are not you will need to either change the scale or write in the missing information**

Click Print

Do this for **BOTH** pages

### **Plan Contract Notes & Dividends**

At top of page click on "Library" then "Documents"

Print all "Order Confirmation" and "Plan Positions Statements" for 2021

They will need to be printed separately

(Order Confirmation are the old Plan Contract Notes - there will be 4 or more if you sold any shares)

(Plan Positions Statements are the Dividends - there will be 2)

Box 38 of T4

If not doing taxes at Union Hall will need to provide the number in Box 38 of your 2021 T4