



TAX TIME

The 2023 tax season is upon us. Your Union is still available to prepare all retired and active Members' personal income taxes, if you so choose. This year's process will be as follows:

There will *not* be any scheduled appointments. Instead, please bring the necessary documentation to the Union Hall during business hours 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.

YOUR UNION AT WORK!

**Information Needed From Members to complete Taxes re: My Share
2022 Tax Year**

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

Purchase Cycles show the Contributions and Purchases

Print or write down all information for 2022

Note: There will be three pages of information. You will need to click on the 2 and then the 3 on the right hand side to get all of the information

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 **ALL THREE** pages

Plan Contract Notes & Dividends

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

Print all "Order Confirmation" sheets for 2022

Print the "Franked Dividends" from April and the "Dividend Confirmation" from Sept

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)

Box 38 of T4

If not doing taxes at Union Hall will need to provide the number in Box 38 of your 2022 T4