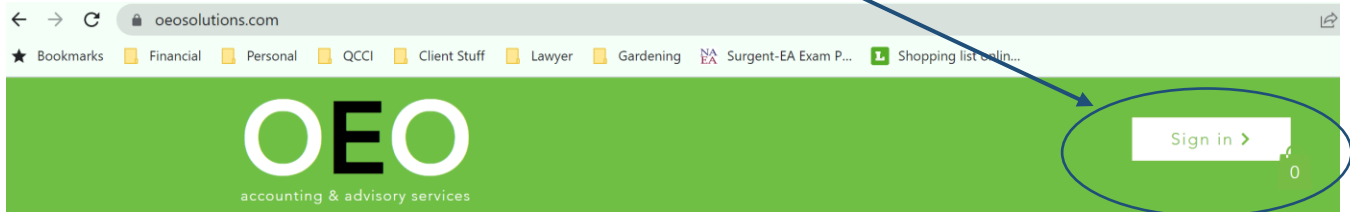


CORPORATE TAX CHECKLIST

It's that time again! Please upload your documents to your personal portal at your earliest convenience. Portal Location: www.oeosolutions.com



Your username is your **email** and if you cannot remember your password, you can reset it via the 'forgot password' link.

CHECKLIST FOR CORPORATE CLIENTS

Where OEO does not complete month end

Bank and Credit Card/Loan Statements (for each month of your fiscal year) – PDF copies	Income & expenses listing (can be a spreadsheet, or reports from your POS, Store Front or system like Quicken or Wave)
If you had employees – list of employees, amounts paid and remitted to government	List of personal draws (if you paid yourself like an employee only – this is not applicable)
Let us know of any changes in ownership, address, phone number for the company	Pension contributions through the company (private pension plan)

If a significant change has occurred (marriage, divorce, child, etc) – please book a call with one of our tax team (link - <https://www.oeosolutions.com/copy-of-appointments-1>)

Looking forward to working with you during this upcoming tax season!
The OEO Team