

March 8th, 2023

Subject: Preparation of your 2022 Income Tax Returns

As you know, income tax time is once again just around the corner. In order to update the authorizations required for our files and adequately render professional services to you, the forms listed below are included with this message:

- Letter of Engagement (*mandatory*)
- Authorization Form (*mandatory*)
- Form T1135 (*mandatory*) *
- Authorization to Disclose (*mandatory for clients of Desjardins Securities*)
- Questionnaire (*optional*) - to assist you with the collection of your tax information and documents required to prepare your tax returns.

Note: All these forms are also available on our Website www.wermenlinger.com/docs.

*** We recommend that you pay special attention to form T1135 “Foreign Income Verification Statement”. It is mandatory that you initial and sign the form where indicated and that you fill in the sections that apply to your situation or write “nil” when non applicable.**

We also ask that each member of your family, for whom we produce income tax returns, complete and sign the authorization forms.

We remind you that financial institutions had until February 28, 2023 to send out most of their tax slips. Trusts, partnerships, and limited partnerships have until March 31, 2023.


To ensure a most efficient service, we would appreciate receiving your tax documents, the questionnaire and the duly completed and signed forms no later than April 14, 2023. Please send the documents to:

Desjardins Securities Inc – Financial Services
Attention: **Mario Sylvestre**
1170 Peel Street, Suite 300
Montréal, Québec H3B 0A9

If you have any questions, please do not hesitate to contact Mario Sylvestre at **514 985-7562** or toll free at **1 877 780-1171, extension 5062671**.



Groupe Wermenlinger Sokolyuk
Encls.

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