



## Wellspring Tax Preparation Service

**T**ax Preparation Services are available to **Wellspring Financial Management** (WFM) clients and customer-owners of **Credit Union Atlantic** (CUA).

**O**ur experienced tax representative is ready to help you with your Income Tax returns, and will ensure your returns are accurately prepared and reviewed for all tax deductions, exemptions and credits using the most current computer software.



Contact us for more information:  
**492-6500**



## *Wellspring Tax Preparation Service – simple and affordable.*

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Eligible customer-owners entitled to an Income Tax refund may qualify for **instant cash back**\* – easily accessible through your Credit Union Atlantic account at any one of our six branch locations.

*\*Some conditions apply.*

### The Process:

- Drop into any one of our six branch locations with all the necessary tax documents for your return (T4's, T5's, etc.);
- We will complete a tax referral checklist and have you sign all necessary documentation;
- Your documents will then be forwarded to our tax consultant for review and completion;
- You will be contacted on the status of your Income Tax return, and details for filing will be finalized.

Our seniors aged 59+ can **save 40%** on their tax return of 5 or less T slips, or **25%** with more than 5 T slips.

*The Wellspring Tax Preparation Service  
is available to individuals only.*

Contact us today for details:  
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