
Tax Season & B2B Bank Statements

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There is a lot to talk about this month as we're right into Tax Season now and as I write this, there are some pretty serious Tariffs being proposed by the US Government which has shaken the market. We've had such a long run up that investors have almost forgot how volatility can feel but we've got a lot of that since February! As always, this will affect your Equity Positions a lot more than it will for Balanced Mandates and Fixed Income.

For all of those who hold B2B Bank Investment Loans, it's important that you keep all of the recent documents that have been sent out. B2B changed their administration process at the end of last year. Because they did this, they have sent two statements for the last quarter of 2017. You'll notice one statement that goes up until November 11, 2017. The second one shows you the remaining days of 2017. It's very important that you use both statements though and add up all the Interest from both statements. This Interest can be Tax Deductible so it is very important!

We'll be available right up until the Easter break if you have any questions about any of the above. Investment companies will be mailing out a number of Tax Documents over the coming days and weeks so keep your eyes open for those.

Looking forward to connecting with all of you soon,

Bryce A. Borden

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