

2020 PERSONAL TAX CHECKLIST

Personal information					
First name		Last name			
Street address		City		Province	
Postal code	Birthdate: yyyy /mm / dd		Last 4 digits of your SIN #		
Marital Status:	Canadian citizen		American citizen		
Cell phone:		Home phone:			
Email:					
Completing return for spouse/partner? Y N If no, please provide Net Income: \$ <u>AMOUNT</u>					
Spouse/partner First Name		Last Name			
Birthdate yyyy / mm / dd		Last 4 digits of SIN #			
Dependents (children or senior parent living with you) (use notes section if more space needed)					
Name	Address (if different)	Relationship	Birthdate	Last 4 digits of your SIN #	
			yyyy / mm / dd		
			yyyy / mm / dd		
Please answer all the following questions				Yes	No
Would you like to set up Direct Deposit with CRA? (If yes, please attach a void cheque)					
Do you own investments or property outside of Canada, which cost more than \$100,000 CDN?					
Did you sell any property in 2020?					
Were you a first time homebuyer in 2020?					
Did you purchase any new investments or change investment advisors? If you invest, do you borrow money to do so?					
Did you work from home, between March to December 2020 due to COVID? If Yes, How many days?					
Have you had any additions to your family this year? Any newborn children? Elderly family members moved in with you?					
Has your marital status changed? Have you started residing with a partner or stopped living with one?					
Have your children started post-secondary schooling? Did they move to attend school?					
Have there been any changes in your health that we should know about? Do you have issues with mobility, sight or hearing?					
Did you change jobs during the year?					
Did you retire in the year?					
Do you want to provide your address and information to Elections Canada?					
Additional Notes and Questions – Please provide details if you have had family changes/dates (birth, marital status, death). Write here all your questions and we will get in touch with you once we check your information					

For self-employed individuals / sole proprietors	
Would you like us to summarize your expenses?	Yes, please summarize (extra cost at \$85/hour)
	No, I've already summarized
Is your business or rental property registered for HST/GST?	Filing period: Regular Quick
Would you like us to complete your HST/GST return?	Yes (please include required documents)
	No (please provide copy of HST/GST filed)
Secure delivery of my completed taxes	
We will provide a digital copy of your completed Personal Tax Return through our secure delivery portal. *A paper copy can be provided upon request.	

PLEASE CHECK THE ITEMS THAT APPLY TO YOU	
Personal Income	Investment Income
T4, T4A – Salaries and employment	T3, T5, T4S – Interest and Dividends
Other employment benefits	T5008 – Statement of Security Transactions
T4A (P) – Canada Pension Plan benefits	Interest on Tax Refunds
T4A (OAS) – Old Age Security benefits	T600 – Canada Savings Bonds
T4A – Other pension or superannuation	T3 – Mutual Fund Income
T4RSP – RRSP income	Foreign income
T4RIF – RRIF income	Annuities
T4E – Employment Insurance benefits	Rental income (full details required)
T5007 – WCB benefits/social services benefits	Summary of investment contract holdings
T1137 – Home Buyers Plan	T5013 – Limited partnership income (loss)
T4RCA – retirement income	Capital gain/losses (full details required)
Other Income	Business Earnings
Alimony received	Self-employment earnings (details required)
Child support received	Farming/fishing earnings (details)
Scholarships/bursaries	Professional earnings (details)
Other – specify: OTHER INCOME SOURCE	Self-employment commissioned earnings (details)
Refundable & Non-refundable Credits	Other Deductions
Married amount – spouse's net income \$ AMOUNT	RRSP
Equivalent to married amount (full details required)	Union/professional dues
Disability deductions	Alimony paid
T2202 – tuition fees	Child support paid
Dependent Tuition Credit or Net Income \$ AMOUNT	Interest paid on student loans
Medical receipts	Interest and carrying charges on investments
Charitable donations	Investment counsel and accounting fees
Attendant care expenses	Employment expenses (details required, form T2200 or T2200 S)
Limited partnership losses of other years	Deductible legal fees
Education Coaching Amount (BC)	Child care expenses
Eligible Educator School Supply Tax Credit	Moving expenses (details required)
Volunteer Firefighter Credit	TL2 – Claim for boarding and lodging
Search and Rescue Credit	
	Other items
Additional documents	Political contribution receipts
Restricted farming losses carry forward	Allowable business investment loss
Prior year Notice of Assessment	Employment insurance benefit repayments
Installment payments for current year	Dependent data (GST credit and child tax benefit)
Details of foreign property or investments held	Declaration of conditions of employment
Capital and non-capital losses carry forward	Loss carry forward information
	First time homebuyer in 2018
	Sale of principal residence in 2018

**IF THIS IS YOUR FIRST YEAR FILING WITH US,
PLEASE PROVIDE A COPY OF YOUR PREVIOUS YEAR'S TAX RETURN.**