

PERSONAL TAX CHECKLIST TAX YEAR 2020

FULL NAME		SIN	
ADDRESS			
DATE OF BIRTH		EMAIL	
MARITAL STATUS		PHONE NUMBER	

***Marital Status: single, divorced, separated, widowed, common-law or married.
If married or common-law, provide details below.**

SPOUSE/COMMON LAW NAME		SIN	DATE OF BIRTH	INCOME FOR 2020
DEPENDANT'S NAME	RELATIONSHIP	SIN	DATE OF BIRTH	INCOME FOR 2020

Reminder: Please provide a copy of your 2019 Notice of assessment

Are you a Canadian Citizen? ___ **Yes** ___ **No**

If a Canadian Citizen, do you authorize CRA to give your name, address, date of birth and citizenship to Elections Canada for the National Register of Electors? ___ **Yes** ___ **No**

Did you own a foreign property at any time in 2020 with a total cost of \$100,000? ___ **Yes** ___ **No**

Did you sell or are considered to have sold all or part of your principal residence? ___ **Yes** ___ **No**

INCOME – DID YOU RECEIVE:	YES	NO	IF YES, PLEASE SEND:
Employment or commission income			T4/T4PS slips, details of other benefits or employment income not on T4 slips (ex. Tips)
Payments from an estate or trust			T3 slips or related information
Old Age Security benefits			T4(OAS) slip
Canada Pension Plan benefits			T4A (P) slip
Pension Income * split with spouse? ___ Yes ___ No			T4RSP/T4RIF/T4A slips
Employment Insurance (EI) benefits			T4E slip
COVID-19 payments from the government such as CERB, CESB or CRB			T4A/ T4E Slips, details
Canadian dividends or interest			T5/T3 slips
Investment in tax shelters/limited partnerships/REITs			T5013/T3 slips, details
Income from sources outside Canada			Slips or details if slips are not available
Rental Income *are you registered for GST? ___ Yes ___ No			Details of Income and expenses – fill out additional rentals checklist
Business /Professional Income *are you registered for GST? ___ Yes ___ No			Details of Income and expenses – fill out additional self employment checklist
Proceeds from sale of stocks, bonds, real estate, options or redemption of mutual funds			T5008 and description of assets, year acquired, date and proceeds of disposition, adjusted cost base and selling costs and annual trading summary
Any income not listed above (ex. Social assistance, workers compensation, etc.)			Slips or details if slips are not available

DEDUCTIONS/CREDITS – DID YOU:	YES	NO	IF YES, PLEASE SEND:
Contribute to or roll over eligible income to an RRSP			RRSP slips / Tax receipts
Pay interest on your student loan in the current year or in prior years and have not claimed it			Interest statements
Pay union or professional dues			Tax receipts
Moved and incur moving expenses to move at least 40 kms closer to work or school			Details and receipts
Pay or receive alimony or maintenance support pursuant to a court order or written agreement			Copy of agreement and details
Pay child care expenses so you could work or attend school			Details and receipts
Incur expenses to earn investment income			Details and receipts
Make charitable or political contributions			Tax receipts
You, your spouse or dependent child become disabled			Form T2201 completed by your physician
Pay for medical or dental expenses for which you were not reimbursed or for premiums for extended medical or dental coverage			List of expenses and receipts
Incur any expenses to maintain an office in your home, automotive or other expenses as required by your employer or due to the COVID-19 Pandemic			Form T2200 to be completed by your employer, mileage log OR Total number of days worked from home due to COVID 19
Buy any tradesperson's or apprentice mechanic's tools			Receipts
You, your spouse or dependent children attend university or college			Form T2202A/T2202/TL11B/TL11C slip signed by the student
Support any relatives who were disabled or did you reside with and provide in-home care for a parent or grandparent who is over 65, or for an infirm dependent adult relative			Details including the income of the person receiving the care
Adopt a child under 18 during the year			Details of adoption fees, expenses
Pay any foreign taxes			Details
Purchase your first home			Details
Volunteer as a firefighter or as search and rescue volunteer for at least 200 hours in the year			Details
Pay for digital news subscription with a qualified Canadian journalism organization			Details and Receipt

OTHER – DID YOU:	YES	NO	IF YES, PLEASE SEND:
Pay any federal tax instalments for the year			Receipts and current statement of account from CRA
Withdraw funds from your RRSP			Details
Have a spouse or common law partner and dependants			Details of their income
Change or add direct deposit information			Details
Change address			Details – contact CRA to update

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