



Personal Income tax return

Checklist for returning clients

Please complete this checklist and include it with other documentation in order to complete your personal tax return. Check yes, if the situation applies to you, otherwise, tick no, or disregard.

If you have investments in mutual funds or partnerships you may not receive the information slips before March 31.

RRSP receipts should be mailed out the first week of March.

All documents must be received by April 15 to ensure your return will be completed by the April 30 deadline

Personal information				
Name				
Email address				
Would you like to schedule a ZOOM or telephone meeting				
Personal Information	Yes	No		
Address			Please provide address including postal code	
New Address if applicable				
Phone number			Number to provided on tax return	
Cell phone			Number security password will be texted to	
Change of marital status			Please provide new status with the date married, common-law (in conjugal relationship more than 12 consecutive months or the parent of a child), separated, divorced or widowed	
Spousal net income (if spousal return not included)			Line 236 of your spouses return	
Dependants			Name, birthdate, gender, social insurance number, net income	
As a Canadian Citizen, do you consent to allow CRA to provide your name, address				

and date of birth to Elections Canada?			
Do you own or otherwise hold foreign property at any time in 2020 with a total combined cost of more than \$100,000			
Did you sell your personal residence?		Date of sale, date of purchase Amount of proceeds, cost of property, principal residence only for all years owned?	
Disabled		Are you or any of your dependants disabled? Please provide names and if there is a T2201 on file with CRA?	
Additional personal information		Please use this space for any additional information	

Income			
Information slips may be sent by email or provided through institution or organization e-accounts, please check your accounts			
Income slips		T4, T4A, T4(OAS) T4A(P) T4A, T4RIP, T4RRSP, T5, T3, T5013, T5008	
COVID payments		Government COVID payments of any kind	
Other employment income		Tips, casual employment income	
Investments		Any investment income not included on slips Dec 31 investment statement, sale or deemed disposition of stocks	
Sale of real property not considered personal residence (cottage, rental property) ZOOM meeting recommended		Year of purchase and cost of property Additions to cost base (capital improvements) Sale price, costs to sell (realtor / legal / mortgage fees)	
Change of use of principal residence from personal to income or income to personal?			
Business income and expenses (not first year in income)		Summary of income and expenses for each business Change of GST status and number if applicable. (An additional charge will be applied if receipts only are provided) Details of capital expenses.	

Business income for new business income (ZOOM meeting recommended)		Name and address of business, details of goods or services provided. Name and SIN of partners, GST status. Summary of income and expenses for each business (An additional charge will be applied if receipts only are provided) Details of capital expenses	
GST (for business) return required		Access number required (same as last year for recurring business)	
Rental income (ZOOM meeting recommended for new rentals)		Summary of income and expenses for each rental. (An additional charge will be applied if receipts only are provided) Details of capital expenses.	
Foreign income		Foreign pension, including US Social security, foreign investments	
Support payments received		Summary of support payments, name and SIN of recipient Copy of agreement if new or changed	
Other income		Income not reported elsewhere	

Deductions and credits			
RRSP		Please include all receipts for 2020 and first 60 days of 2021 Receipts for first 60 days are generally not available until March 2	
Child care		Receipts and name with SIN if an individual, spouses earned income required.	
Professional / Union dues		Receipts required unless on T4	
Investment expenses		Receipts or statements showing interest payments	
Support payments made		Summary of support payments, name and SIN of recipient Copy of agreement if new or changed Child support is not deductible	
Moving expenses ZOOM meeting recommended		Must be more than 40 km closer to your work location. Receipts for moving costs, employer information, costs of selling home	
First time home buyer		Address and date of purchase	
Employment expenses (Regular)		Declaration of conditions of employment and list of expenses Office in home expenses by square foot, auto expenses by km for work vs personal, supplies used in the year, cell phone Form 2200 signed by employer	

Employment expenses 2020 Due to working at home - COVID		Dates you worked from home required (min. 4 consecutive weeks, full or part time employment) Form 2200S may be required if flat rate deduction not used	
Adoption expenses		Receipts required	
Do you or your dependants have an impairment that does not qualify for the Disability Tax Credit		Must be declared as a dependant: Name, Birthdate, SIN and net income required	
Student loan interest		Statement from lending institution required	
Digital news subscription		You must have paid the amounts to a qualified Canadian journalism organization (QCJO) that does not hold a licence to broadcast, for a digital news subscription to content that is primarily original news.	
Tuition fees for yourself or dependant		T2202(A), TL11(A) or official tuition receipt required Dependant, back of T2202A filled out	
Medical expenses for yourself or dependant		Prescription summary, medically required equipment with supporting documentation, supplemental insurance premiums, travel medical insurance premiums	
Home renovation tax credit (ZOOM meeting suggested)		Receipts and list of home renovations made to improve accessibility for seniors or persons with disabilities	
Charitable donations		Receipts required	
Political donations		Receipts from political party required	
Educator credit		Teachers may claim a credit for school supplies not otherwise reimbursed. List of Expenses with amounts required	
Training credit		Please describe training or apprentice program (shipbuilder, plumber etc.)	
Instalments		Amount paid for 2000 taxes	

Notes

Please use this section to provide any notes or special instructions