

2020 PERSONAL TAX CHECKLIST

Complete and return with your documents

DOCUMENTS CHECKLIST

- If your Financial Advisors provide a year-end package, pass it directly to us rather than complete below.
- All Slips T3, T4, T4A, T4AP, T4AOAS, T4PS, T4RIF, T4RSP, T5, T5013, T5007, T5008, T4E, RC62 (UCCB) etc.
- Miscellaneous Income
 - You are required to self-report income that does not have a T-slip.
- Capital Gains and Losses
 - Non-registered account statements with disposition details including a realized gain and loss report or a summary of proceeds and **adjusted cost base**.
- Principal Residence Disposition
 - Full residence address, year of acquisition, proceeds of disposition.
- Rental income and expenses
- Business income and expenses (Self-employment)
- GST/HST filing forms, if applicable
- RRSP contribution slips, childcare, professional and union dues
- T2200 and your summary of eligible employment expenses.
- If you worked from home in 2020 due to COVID and wish to claim employment expenses, there are two options:
 - Simplified method – provide the number of days worked from home. A T2200S is **NOT** required from your employer.
 - Detailed method – T2200S signed by your employer and your summary of employment expenses. Retain all receipts.
- Interest on debt used for business or investment purposes.
- Proof of spousal loan interest paid.
- Money management fees for unregistered accounts
- Medical/Dental/Health statements
 - Include health plan premiums and a summary of reimbursed expenses. Your pharmacy will print an annual summary.
- Teacher & ECE School Supply credit
 - Qualifying expenses paid, include an employer statement certifying expenses are required for work.
- Charitable and Political donation receipts
- Tuition Fees and student rent receipts
 - T2202, T2202A, or US Tuition TL11A, signed by student if transferring to a parent.
- 2019 T1 Return, if you are a new client this year.
- Income tax instalments paid

PLEASE ANSWER THE FOLLOWING QUESTIONS

1. Are you a US citizen? Yes (Y) or No (N) _____
2. Do you spend time in the US? If yes, provide number of days: 2020 _____ 2019 _____ 2018 _____
3. Do you own US property? If yes, describe below (ex. recreational condo, rental property)

4. Do you have other US source income? If yes, explain below.

5. Has your banking information changed during the year? Be sure to edit your direct deposit information with CRA.

TELL US IF YOUR TAX STATUS HAS CHANGED

Marital/ dependents/ caregiver/ date of change. If you require more space, email us the details.

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