

DATE: \_\_\_\_\_

Taxpayers Names	EMAIL ADDRESS	S.I.N	Date of Birth (YY/MM/DD)	Phone (Cell)

Address	Postal code	Phone (Res.)
<b>Please specify if you would like electronic or a physical copy of your return?</b>		

Is this the first time we are preparing your tax return? Y / N  
*\*If yes, please provide a copy of last year's return and NOA*

**Marital Status**  Married  Single  Common-law  Separate  Divorced  Widowed  
*\*\*If there are changes to marital status, please provide the date of change:* \_\_\_\_\_

If we are not completing your spouse's return, please provide their 2020 Net Income from line 23600 of their tax return \$ \_\_\_\_\_

1. Are you a Canadian Citizen? **Y / N**                                      Are you a Canadian Resident **Y / N**

2. Did your marital status change during the year? **Y / N**  
*\*If yes, please provide the date and status it changed from/to* \_\_\_\_\_

3. Did your immigration or citizenship status change during the year? **Y / N**  
*\*If yes, please provide the date and status it changed from/to* \_\_\_\_\_

4. Did you file for bankruptcy during the year? **Y / N**

**5. ELECTIONS CANADA:** The taxpayer authorizes CRA to provide his/her name, address and date of birth to Elections Canada to update his/her information you feel will help us in the preparation of your tax return. **Y / N**

**6. FOREIGN REPORTING:**  
 Did you own or hold foreign property with a total cost of more than \$100,000 CAD at any time during the year? *Include any cash, stocks, trusts, partnerships, real estate, tangible and intangible property, contingent interests, convertible property, etc* **Y / N**

**7. CANADA RELIEF DUE TO COVID:**

1) **CERB** (Canadian Emergency Recovery Benefit) Did you receive any payments? **Y / N**  
*\*If yes, how many periods did you apply for?* \_\_\_\_\_

*\*If yes, have you paid back a portion and how much?* \_\_\_\_\_ **Y / N**

2) **CRB** (Canadian Recovery Benefit) Did you receive any payments? **Y / N**

- 3) **Alberta Emergency Isolation Support** Did you receive the one time payment of \$1146? Y / N
- 4) Did you work from home due to COVID? Y / N
- \*If yes, will you be receiving a detailed or simplified T2200 from your employer? Y / N
- \*I am not sure, please contact me at \_\_\_\_\_
- 5) **CEBA Loan** Did you apply as a **Sole Proprietor**? Y / N

8. **PROPERTY INFORMATION:** Has your primary residence address changed in the last year? Y / N

\* If yes, please write your new address:

New Address: \_\_\_\_\_

**Did you sell your principal residence or other real property in the tax year?** Y / N

*All changes in ownership of property is required to be reported on your tax return. This includes changes of use from principal residence to a rental property.*

- \*If yes, please provide the following details:
- Address of property \_\_\_\_\_
  - Proceeds of disposition \_\_\_\_\_
  - Year of acquisition \_\_\_\_\_
  - Ownership – sole ownership or joint? \_\_\_\_\_
  - Property used **only** as a principle residence? Y / N

Did you dispose of any property that was part of a separation? Y / N

*ie: vacation property, vehicles, boats, investments, etc*

\*If yes, please provide a property agreement

Did you move your residence in order to earn salary, wages, or self-employment income, or to attend an educational institution in a new location in Canada? Y / N

Did your move result in your new residence being **at least 40km closer** to your new place of work or school, compared to your previous residence? Y / N

Did you cease your business or employment at the former location or cease attending your former educational institution? Y / N

Did you sell/purchase real estate, including rental property held for investment purposes? Y / N

**Dependents:** Any new dependents from the previous year? Y / N

\*If yes, please add the new dependent below:

1. Dependents					
Name	Relationship	Date of Birth (YY/MM/DD)	S.I.N.	Disabled?	Income

**Do any of your dependents have a Disability Tax Credit in place?** Y / N

## 2. Employment Income

Did you earn income from employment? Y / N  
***If yes, are official slips attached? (T4, T4F, T5007)*** Y / N

## 3. Employment Deductions

Do you have any Self-Employment deductions or pay union/professional dues? Y / N  
***If yes, are official slips attached? (T2200, T4PS)*** Y / N

## 4. Pension & Retirement Income

Do you receive Canada Pension Plan Income? (T4A, T4A (OAS), T4ARSP, T4ARIF) Y / N

## 5. RRSP Contributions & Pension Related Deductions

Did you make RRSP contributions last year? Y / N  
Did you make RRSP contributions in the 1<sup>st</sup> to 60 days of this year? Y / N  
***If yes, are all official receipts attached?*** Y / N

## 6. Investment Income

*If you earned investment income outside of your RRSP last year, you will have received T-slips from the payors of that investment income.*

Did the taxpayer receive any interest income? (T5, T3, T5008) Y / N  
Have you bought or sold any Cryptocurrency? Y / N

## 7. Self-Employment / Business Income

Do you have self-employment income? Y / N  
Do you have GST? Y / N  
Do you file your own GST as a sole proprietor? Y / N  
***If you were self employed during the year, please request and fill out the 'Expenses Deductible For Income Tax Purposes By Self-Employed Individuals' form.***

## 8. Rental Income

Do you have rental income? Y / N  
***If you have rental income, please request and fill out the 'Rental Income' Form***

## 9. Other Income, Other Deductions

Do you have Tuition? Y / N  
Do you have any Donations? Y / N  
Do you have Child Care Expenses? Y / N  
Do you have Alimony? Y / N  
Do you have Scholarships? Y / N

## 10. Additional Information

## Personal Tax Checklist

### Income

- Employment income (T4)
- Employment insurance benefits (T4E)
- Investment income (T3, T5, T5018, T4PS, T5008)
- Old age security and CPP benefits (OAS, T4AP)
- RRSP or other pensions (T4A, T4RSP, T4RIF)
- WSIB & Social Assistance payments (T5007)
- Any foreign Pension (amount and currency)
- Capital gains or losses (buy-sell slips, T5008)
- Subcontractor (T5018)
- Spousal support payments (support agreement)
- Rental property (revenue and expenses, Airbnb, VRBO)
- Business income (revenue and expenses)
- Other employment (tips, stocks)
- CERB
- CRB

### Deductions & Credits

- Charitable donation receipts
- RRSP Contribution receipts
- Political contributions
- Child care expenses
- Adoption expenses
- Costs to access medical intervention required in order to conceive a child
- First time home buyer
- Moving expenses (if the move was over 40 km to be closer to work)
- Costs to renovate your home to enhance mobility for taxpayers eligible for the Disability Tax Credit, or 65 years of age or older at Dec 31/20
- Investment interest expenses and/or counsel fees
- Union or professional dues
- Spousal support payment
- Caregiver (list dependent)
- Medical expenses
- Student loan interest
- Tuition receipts for students (T2202A) *must retrieve from student account*
- Eligible educator school supplies (receipts up to \$1,000)
- Employment expenses
- Transit passes up to June 2020
- Volunteer firefighter's certification (if spent more than 200 hours volunteering)

### Other Documents

- Notice of Assessment of last tax year filed (**only provide if we did not file your return**)
- Canada Revenue Agency correspondence
- Disability Tax Credit application (T2201)
- Declaration of Conditions of Employment (T2200)
- Custody arrangement documentation