

2020 Personal Tax Information Checklist

IDENTIFICATION:

A. Personal Information

1. Name: _____
2. Residence address: _____
_____ Postal Code: _____
3. Email address: _____
4. Telephone - Bus: _____ Cell: _____
- Res: _____
5. Social Insurance Number: _____
6. Date of birth: _____
7. If employed - type of work or position: _____
- name of present employer: _____
8. 2019 Notice of Assessment and any reassessments received during the year (please attach a copy to the package)
9. Were you born in the U.S. or are you a U.S. citizen? YES NO

B. Spousal Information

10. Date of change in marital status, if applicable: _____
11. Full name of spouse: _____
12. Social Insurance Number: _____
13. Date of birth: _____
14. Copy of your spouse's return
(in the event we do not prepare it): _____
15. Was your spouse born in the U.S. or is he/she a U.S. citizen? YES NO

C. Dependant Information

- | | <u>Dependant 1</u> | <u>Dependant 2</u> | <u>Dependant 3</u> |
|---|--------------------|--------------------|--------------------|
| 16. Name of dependants: | _____ | _____ | _____ |
| 17. Relationship to self: | _____ | _____ | _____ |
| 18. Date(s) of birth: | _____ | _____ | _____ |
| 19. Net income details: | _____ | _____ | _____ |
| 20. Social Insurance Number (if available): | _____ | _____ | _____ |
| 21. Physically or mentally infirmed? | YES NO | YES NO | YES NO |

INCOME

1. Employment income (per T4)
2. Employment related income not included on T4 tax slips (stock option benefits, car allowances, etc.).
3. Investment income (per T5, T600) for foreign source income include details of foreign tax withheld; brokerage statements.
 - ◆ for foreign source income include details of foreign tax withheld;
 - ◆ brokerage statements.
4. Partnership income allocations (per T5013).
5. Pensions, annuities, etc. (per T4A, T4A(OAS), T4A(P), T4RIF).
6. Employment insurance benefits (per T4E).
7. Trust income (per T3).
8. Scholarships, bursaries, etc., (per T4A).
9. Business, professional or property income - enclose details of income & expenses (e.g., tax shelters, rental properties, sole proprietorships).
10. Capital gains & losses - enclose details of transactions during year including year of purchase. Where possible, include all broker statements or closing adjustments.
11. Alimony or separation allowance.
12. RRSP withdrawals (T4RSP's).
13. Please provide a list of Canada Savings Bonds and other investments on which interest is accruing.
14. Have you received any of the following: Canada Emergency Response Benefit (CERB), Canada Emergency Student Benefit (CESB), Canada Recovery Benefit (CRB), Canada Recovery Caregiver Benefit (CRCB), or Canada Recovery Sickness Benefit (CRSB) (per T4A).

[illegible]

Note: If you do not have an information slip for a particular income item, please state the actual amount received, nature of payment (e.g. tips, interest income, etc.), and the amount of any tax withheld.

DEDUCTIONS FROM INCOME AND CREDITS

1. RRSP contributions; include all contribution receipts and your 2020 contribution limit statement attached to your 2019 Notice of Assessment.
2. Union and professional dues.
3. Charitable donations.
4. Political contributions.
5. Medical expenses (including premiums paid to a private health services plan and fertility treatment expenses incurred in 2007 and later years) - include original receipts.

*** Note: if you have many prescription receipts, consider obtaining a summary for 2020 from your pharmacy (rather than providing all of the individual receipts)***

Enclosed	N/A

PLEASE ATTACH ALL APPLICABLE INFORMATION SLIPS OR NECESSARY DETAILS

DEDUCTIONS FROM INCOME AND CREDITS (continued)

6. Alimony, maintenance or separation payments - amount, name and address of payee.
7. Expenses to earn commissions; include a completed and **signed T2200 or T2200s from your employer.**
8. Unreimbursed employment expenses (e.g., travelling expenses); include a completed and **signed T2200 or T2200s from your employer.**
9. Moving expenses not reimbursed.
10. Child care expenses (include name, address, and social insurance number of caregiver and receipt from caregiver).
11. Carrying costs related to investment income (accounting, investment consulting fees & interest).
12. Tuition fees and education deduction (T2202, or TL11A and professional exam receipts). These may be claimed on behalf of a dependant in certain circumstances. Ensure dependant has signed back of form. Costs relating to certain professional exams also qualify for a credit.
13. Public transit passes. (Only available to Ontario seniors aged 65 or older).
14. Home Buyers' Amount -
If you are a first-time home buyer and you are eligible for the Home Buyer's Amount, please provide the date of acquisition of your home and the address of the property.
15. Receipt or amount for taxpayer's student loan interest.
16. Amount of property taxes/rent paid in the year and name of landlord/municipality.

Enclosed	N/A

MISCELLANEOUS

- A. Ontario Benefit Programs
1. Property taxes paid in year. Specify the number of months in year and the municipality to which payments were made.
 2. Rental payments in year (include amount paid, address and name of landlord and number of months rented in year).
- B. Instalments and Notices of Assessment
1. Submit list of instalments paid in respect of 2020 taxes (attach most recent notice).
 2. Submit copies of any assessments or reassessments received in 2020 and 2021 to date.
- C. RRSP Home Buyers Plan - Please indicate the portion of RRSP contributions designated as repayments to your Home Buyers Plan. Also include a copy of your Home Buyers Plan statement received from CRA.
- D. Home Accessibility Tax Credit - Please indicate if you incurred costs for your principal residence to improve accessibility or enhance the mobility for a family member over 65, or one eligible to claim the disability tax credit.
- E. If you worked from home in 2020 due to the COVID-19 pandemic and worked more than 50% of the time from home for a period of more than 4 consecutive months in 2020, then you can claim up to \$2 per working day to a maximum of \$400 as a tax deduction. If you meet the requirements and would like to claim the flat rate of \$2 per day, then please indicate the number of days.

Enclosed	N/A

FOREIGN PROPERTY

Did you own foreign properties* at any time in 2020
with a total cost of more than Cdn. \$100,000? YES _____ NO _____

*Examples of foreign properties are: foreign bank accounts, shares of foreign corporations, and real properties located outside of Canada.

Foreign properties do not include: vacation properties, and foreign investments held in Canadian registered mutual funds.

DISPOSITION OF REAL PROPERTY

Did you dispose of a real property in 2020? If yes, then please complete the following:

- i) Address
 - ii) Proceeds of disposition
 - iii) Year of acquisition
 - iv) Number of years designated as principal residence
-

DIRECT DEPOSIT

****Note: Canada Revenue Agency is switching to direct deposit for all payments that it issues!****

To sign up or change your direct deposit information with the CRA, please fill out the banking information below, and attach a photocopy of a VOID cheque for your personal bank account. **(Note that if you have already provided this information to us, you do not need to provide it again this year.)**

Branch number _____ Account number _____

Financial Institution name: _____

Address: _____ Postal Code _____

Telephone No. _____

Exact name of account holder if different from yourself _____

RENTAL PROPERTY - INCOME AND EXPENSES
(if you did not own a rental property in 2020, leave this blank)

1. Rental income
2. Other income
3. Advertising
4. Insurance
5. Interest
6. Office expenses
7. Professional fees (legal, accounting)
8. Management fees
9. Repairs & maintenance
10. Salaries, wages, and benefits
11. Property taxes
12. Travel
13. Utilities
14. Automobile expenses - see 'Automobile Expenses' chart on page 9
15. Other expenses (please specify)
16. Personal % of rental expenses
17. Ownership % of the rental property
18. Address of property

Property 1	Property 2	Property 3

BUSINESS OR PROFESSIONAL INCOME AND EXPENSES

(if you did not have a self-employed business/profession in 2020, leave this blank)

1. Business/professional income
2. Advertising
3. Meals & entertainment
4. Insurance
5. Interest
6. Bank charges
7. Professional memberships and dues
8. Office expenses
9. Supplies
10. Professional fees (legal and accounting)
11. Management fees
12. Rent
13. Repairs & maintenance
14. Wages, salaries, and benefits
15. Property taxes
16. Travel expenses (note: for automobile expenses, see #20 below)
17. Utilities
18. Telephone & internet
19. Postage & delivery
20. Automobile expenses - see 'Automobile Expenses' chart on page 9
21. Capital assets purchased (eg. furniture, equipment, computer equipment, etc) - **please include a photocopy of each purchase invoice**
22. Private health services plan premiums
23. Professional development (eg. Conferences - note: do not include meals; include meals in 'Meals & entertainment', ie. #3 above)
24. Home office expenses - see 'Home Office Expenses' chart on page 10
25. Canada Emergency Business Account - the forgivable portion is taxable in the year you receive the loan.
26. Canada Emergency Wage Subsidy or 10% Temporary Wage Subsidy.

[illegible]

PLEASE ATTACH ALL APPLICABLE INFORMATION SLIPS OR NECESSARY DETAILS

EMPLOYMENT EXPENSES (AUTHORIZED, AND UNREIMBURSED)
(if you did not incur expenses authorized by your employer in 2020,
leave this blank)

Is signed T2200 or T2200s enclosed?

1. Travel meals
2. Hotels and other accomodation
3. Air and rail fares
4. Taxi and public transit
5. Parking
6. Office supplies
7. Other supplies (please specify)
8. Telephone & internet
9. Professional fees (legal and accounting)
10. Advertising/promotion
11. Meals & entertainment (for clients)
12. Professional memberships and dues
13. Postage & delivery
14. Other office expenses
15. Auto rental
16. Home office expenses - see 'Home Office Expenses' chart on page 10
17. Automobile expenses - see 'Automobile Expenses' chart on page 9

AMOUNT

AUTOMOBILE EXPENSES

1. Make
2. Model
3. Year
4. Date of acquisition, if acquired in 2020 **(please provide a copy of the purchase agreement or lease agreement)**
5. Total number of KM driven in 2020 **(please provide a precise number)**
6. Number of KM driven in 2020, for business purposes **(please provide a precise number)**
7. Gas expense
8. Financing interest expense
9. Insurance expense
10. License & registration fees
11. Repairs & maintenance expense
12. Leasing costs
13. Other automobile expenses (please specify)
14. Parking and tolls expense

AMOUNT

HOME OFFICE EXPENSES

1. Total house area (square feet)
2. Area of the home office space (square feet)
3. Heat
4. Electricity
5. Insurance
6. Repairs & maintenance
7. Mortgage interest
8. Property tax
9. Water and sewage
10. Condo fees
11. Rent
12. Other expenses (please specify)

AMOUNT

COMMENTS

Please fill in any other comments or information you feel is pertinent to your 2020 tax year.