



## 2021 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. 2020 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             |



**DEDUCTIONS FROM INCOME AND CREDITS (continued)**

	Enclosed	N/A
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). <ul style="list-style-type: none"> <li>a. These may be claimed on behalf of a dependant in certain circumstances. Ensure dependant has signed back of form.</li> <li>b. Costs relating to certain professional exams also qualify for a credit.</li> </ul>		
13. Home Buyers' Amount – If you are a first-time home buyer and you are eligible for the Home Buyer's Amount, please provide the <b>date of acquisition of your home and the address of the property.</b>		
14. Receipt or amount for taxpayer's student loan interest.		
15. 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 <b>over 65</b> , or one eligible to claim the disability tax credit.		
16. If you worked from home in 2021 due to the COVID-19 pandemic <b>and</b> worked more than 50% of the time from home for a period of more than 4 consecutive weeks in 2021, then you can claim up to \$2.00 per working day to a maximum of \$500 as a tax deduction. If you meet the requirements and would like to claim the flat rate of \$2.00 per day, then please indicate the number of days.		

## MISCELLANEOUS

### A. Instalments and Notices of Assessment

1. Submit list of instalments paid in respect of 2021 taxes (attach most recent notice).
2. Submit copies of any assessments or reassessments received in 2021 and 2022 to date.

### B. RRSP Home Buyers Plan –

1. Please indicate the portion of RRSP contributions designated as repayments to your Home Buyers Plan.
2. Also include a copy of your Home Buyers Plan statement received from CRA.

### C. For Ontario Residents:

#### **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).
3. Ontario Seniors' Home Safety Tax Credit. See the following link for details; [Ontario seniors-home-safety-tax-credit](#)
4. Public transit passes. (only available to Ontario seniors aged 65 of older).

Enclosed	N/A

## FOREIGN PROPERTY

Did you own foreign properties\* at any time in 2021 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.

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## DISPOSITION OF REAL PROPERTY

Did you dispose of a real property in 2021? 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
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## 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 SUMMARY

(If you did not own a rental property in 2021, please leave schedules blank.)

1 <sup>st</sup> Property	2 <sup>nd</sup> Property	3 <sup>rd</sup> Property
Address	Address	Address
City, province, postal code	City, province, postal code	City, province, postal code
Percentage of ownership	Percentage of ownership	Percentage of ownership

DESCRIPTION	Amount		
	1st Property	2nd Property	3rd Property
Rental income			
Other Income			
Advertising			
Insurance			
Mortgage Interest			
Office expenses			
Professional fees (legal, accounting)			
Management fees			
Repairs & maintenance			
Salaries, wages, and benefits			
Property Taxes			
Utilities			
Automobile expenses - see 'Automobile Expenses' pg 9			
Other expenses (please specify)			
Personal % of rental expenses	%	%	%

During the year, did you carry out any renovations or acquire any furnishings, appliances?				
Name of Vendor	Description	Amount		
		1st Property	2nd Property	3rd Property

PLEASE ATTACH ALL APPLICABLE INFORMATION SLIPS OR NECESSARY DETAILS

## BUSINESS OR PROFESSIONAL INCOME AND EXPENSES

(If you did not have self-employed business/professional income in 2021, please leave this page blank)

Income	Amount
Business/professional Income (including GST/HST if applicable)	
HST collected (if applicable)	
<b>Expenses (Please use the gross amount including HST paid)</b>	
Advertising	
Meals and entertainment	
Insurance	
Interest	
Bank charges	
Professional memberships and dues	
Office expenses	
Supplies	
Professional fees (legal and accounting)	
Management fees	
Rent	
Repairs & maintenance	
Wages, salaries and benefits	
Property taxes	
Travel expenses (Note: Do not include automobile expenses, see below)	
Utilities	
Telephone & internet	
Postage & delivery	
Automobile expenses - see 'Automobile Expenses' pg 9	
Capital assets purchased (eg. furniture, equipment, computer equipment, etc.) - <b>please include a photo copy of each purchase invoice</b>	
Private health services plan premiums	
Professional development (eg. Conferences - note: do not include meals. Please include meals in 'Meals & entertainment' above.)	
Home office expenses - see 'Home Office Expenses' chart on page 10	
Canada Emergency Business Account - the forgivable portion is taxable in year the loan was received.	
Canada Emergency Wage Subsidy	
Other (Specify)	

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**EMPLOYMENT EXPENSES (AUTHORIZED, AND UNREIMBURSED)**

(If you did not incur expenses authorized by your employer in 2021, leave this page blank)

Expenses	Amount
Is a signed T2200 and/or T2200s enclosed?	
Travel meals	
Hotels and other accomodation	
Air and rail fares	
Taxi and public transit	
Parking	
Office Supplies	
Other supplies (please specify)	
Telephone & internet	
Professional fees (legal and accounting)	
Advertising/promotion	
Meals & entertainment (for clients)	
Professional memberships and dues	
Postage & delivery	
Other office expenses	
Auto rental	
Home office expenses - see 'Home Office Expenses' chart on pg. 10	
Automobile expenses - see 'Automobile Expenses' chart on pg. 9	
Other employment expenses (please specify)	

**PLEASE ATTACH ALL APPLICABLE INFORMATION SLIPS OR NECESSARY DETAILS**



## AUTOMOBILE EXPENSES

Automobile Information	
Make	
Model	
Year	
Original purchase price	
Date of acquisition, if acquired in 2021 <b>(please provide a copy of purchase agreement or lease agreement)</b>	
Total number of KM driven in 2021 (please provide a precise number)	
Number of KM driven in 2021, for business purposes (please provide a precise number)	
Automobile Expenses	Amount
Gas expense	
Financing interest expense	
Insurance expenses	
License & registration fees	
Repairs & maintenance expense	
Leasing costs	
Other automobile expenses (please specify):	
Parking and tolls expense	

PLEASE ATTACH ALL APPLICABLE INFORMATION SLIPS OR NECESSARY DETAILS

**HOME OFFICE EXPENSES**

<b>Home Office</b>	
Total area of home office (sqft)	
Total area of home (sqft)	
<b>Home office expenses:</b>	<b>Amount</b>
Heat	
Electricity	
Insurance	
Repairs & maintenance	
Mortgage interest	
Property Tax	
Water and sewage	
Condo fees	
Rent	
Other Expenses (Specify):	

**COMMENTS**

Please fill in any other comments or information you feel is pertinent to your 2021 tax year.