

PERSONAL TAX CHECKLIST

You will receive your Personal Tax Return electronically by email. Do you prefer a paper copy? YES

<p>Primary Contact Information</p> <p>Name: _____</p> <p>Social Insurance No.: _____</p> <p>Date of Birth: _____</p> <p>Phone: _____</p> <p>Email: _____</p>	<p>Spouse Information (if applicable)</p> <p>Name: _____</p> <p>Social Insurance No.: _____</p> <p>Date of Birth: _____</p> <p>Phone: _____</p> <p>Email: _____</p>
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<p>Current mailing address:</p> <p>Previous mailing address & date of move: <i>(If moved during the year)</i></p> <p>Province of residence as of December 31st: _____</p> <p>Northern residents deduction to claim:</p> <p><input type="checkbox"/> Full <input type="checkbox"/> Half <input type="checkbox"/> None</p>	<p>Marital Status:</p> <p><input type="checkbox"/> Married <input type="checkbox"/> Common-law</p> <p><input type="checkbox"/> Single <input type="checkbox"/> Widowed</p> <p><input type="checkbox"/> Divorced <input type="checkbox"/> Separated</p> <p>Did either of the following change during the year?</p> <p><input type="checkbox"/> Marital Status: _____ <i>(If yes, provide date of change)</i></p> <p><input type="checkbox"/> Last Name: _____ <i>(If yes, provide new last name)</i></p>
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Dependent Name	Male	Female	Social Insurance No.	Date of Birth		
				Year	Month	Day

Are you a Canadian citizen?	Yes	No	Yes	No
Do you agree to CRA providing your name, address, and date of birth to Elections Canada for the National Register of Electors?	Yes	No	Yes	No
Did you own foreign property with a cost of \$100,000 or more at any time during the year? (includes U.S. property and investment portfolios with stocks or mutual funds with U.S. or International holdings)	Yes	No	Yes	No
Did you sell property (principal residence, rental property, vacation home etc.) during the year?	Yes	No	Yes	No
Do you have, or share, custody of a child after a relationship breakdown? Does this child live with you? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how often? <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time	Yes	No	Yes	No
Has your banking information changed since your last direct deposit from CRA? If yes, you must provide a VOID cheque.	Yes	No	Yes	No
Did you pay personal tax installments during the year? If yes, \$_____	Yes	No	Yes	No
Did you withdraw RRSP's to buy a home or to finance full-time education for you or your spouse?	Yes	No	Yes	No
Internet Business Activity: Do you have a webpage or websites from which you earn income? If yes, provide website address: _____	Yes	No	Yes	No
Percentage of gross income generated from the website:	%		%	

Northern Residents Travel Benefit

Does your **T4** include an amount for **Box 32** Northern Travel Benefit? Yes No

If yes, provide information below for up to 2 trips. Trips may include camping, weekend getaways, family vacations, etc.

	Dates of Trip	Destination	# of km travelled	Cost of Accommodation	Names of family members in your household who travelled
Trip 1				\$	
Trip 2				\$	

COVID-19 Benefits

Did you receive any benefits listed below?

	Primary		Spouse	
Canada Emergency Response Benefit (CERB)	Yes	No	Yes	No
Canada Emergency Student Benefit (CESB)	Yes	No	Yes	No
Canada Recovery Sickness Benefit (CRSB)	Yes	No	Yes	No
Canada Recovery Caregiving Benefit (CRCB)	Yes	No	Yes	No
Canada Recovery Benefit (CRB)	Yes	No	Yes	No
Employment Insurance Program (EI)	Yes	No	Yes	No
One-time payment Disability Support	Yes	No	Yes	No
One-time payment GST/HST Credit	Yes	No	Yes	No
One-time payment Canada Child Benefit	Yes	No	Yes	No
One-time payment OAS/GIS	Yes	No	Yes	No
Canada Emergency Wage Subsidy (CEWS)	Yes	No	Yes	No
Canada Emergency Rent Subsidy (CERS)	Yes	No	Yes	No
Canada Emergency Business Account (CEBA) – the forgivable portion of the interest-free loan under CEBA is taxable in the year the loan was received	Yes	No	Yes	No

Working from Home

Did you work from home in 2020 due to the COVID-19 pandemic for more than 50% of the time for a period of at least four consecutive weeks in 2020?	Yes	No	Yes	No
Number of days you worked from home in 2020 (include both full-time and part-time days, DO NOT include days off, vacation days, sick leave days or other absences).				
On average, how many hours did you work per day while working from home?				
Do you choose to claim the flat rate method and claim \$2/day? (Employer certification and receipts are NOT required)	Yes	No	Yes	No
Do you choose to claim the detailed method and claim actual expenses? (Amount of actual expenses and a T2200S form completed and signed by your employer is required)	Yes	No	Yes	No
Did your employer reimburse ALL of your home office expenses?	Yes	No	Yes	No
Did your employer reimburse SOME of your home office expenses? If so, how much?	Yes	No	Yes	No
	\$		\$	

Check the boxes below that are applicable to your tax return and include any additional details.

Income		Deductions, Tax Credits and Expenses	
T4 - Employment Income		RRSP contribution receipts	
T4A - Other Income		Professional dues	
T4AP - CPP Benefits		Child care expense	
T4A OAS - Old Age Security		Employment expenses – T2200 required	
T4E - Employment Insurance Benefits		Moving expenses	
T4RSP - RRSP Income		Spousal and/or Child Support paid	
T4 RIF - RRIF Income		Adoption related expenses	
T5 - Interest and Dividend Income		Charitable and/or Political donations	
T3 - Estate/Trust / Mutual Funds Income		Tradesperson’s tools acquired by an employee	
T5007 - Social Assistance / WCB		Tools acquired by apprentice vehicle mechanics	
T5013 - Limited Partnership Income		T2201 Disability tax credit	
T5008 - Statement of Security Transactions - Provide the cost when purchased		T2202 Tuition and Education	
		T2202 Tuition transferred from dependent	
Interest on personal tax refund		Interest paid on Student Loans	
Alimony / Spousal Support received		Are you a first-time home buyer?	
Scholarship, fellowship, bursary		Caregiver amount	
Rental Income & related expenses		Investment counsel and management fees	
Foreign sources		Eligible educator school supply tax credit	
Self-Employment income & related expenses		Teachers/Early Childhood Educator school supplies	
Capital Gains / Losses - Provide an investment statement from your Advisor		Interest on money borrowed to purchase investments	
Bitcoin or other cryptocurrency transactions		Pension Split: spouses may jointly elect to split certain pension income reported by the other spouse	
Income from sources of the sharing economy such as Skip the Dishes, Airbnb, VRBO, Uber, TappCar or other online rental activity		Home accessibility tax credit Home renovations for disabled person or senior citizen	
Covid-19 benefits received without a tax slip. Provide details.		Medical expense including premiums paid to a private health services plan i.e. Alberta Blue Cross	
		NEW Digital News Subscription Tax Credit: Do you subscribe to a Qualifying Digital News Subscription? If yes, provide your receipt.	
Other Income / Missing tax slips		NEW Canada Training Credit: Did you take a course to improve your skills in an occupation? If yes, provide details on tuition and your receipt.	
		Other Deductions, Tax Credits or Expenses:	

IMPORTANT: If you do not report all of your income slips (T4, T4A, T5, T3, etc.) and other income when filing your personal income tax return, significant penalties and interest may be assessed by CRA. If you believe that you have not received all of your 2020 slips please provide details of any missing information.