

PERSONAL TAX CHECKLIST

Primary Contact Information

Name: _____
 Social Insurance No.: _____
 Date of Birth: _____
 Phone: _____
 Email: _____

Spouse Information (if applicable)

Name: _____
 Social Insurance No.: _____
 Date of Birth: _____
 Phone: _____
 Email: _____

How would you like to receive your final package?

Electronic Paper

<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: <input type="checkbox"/> Full <input type="checkbox"/> Half <input type="checkbox"/> None</p>	<p>Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Common-law <input type="checkbox"/> Single <input type="checkbox"/> Widowed <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

Please include details for trips you and/or your family members took in 2021. Trips may include camping, weekend getaways, family vacations, etc.

	Dates of Trip	Destination and reason for travel	Cost of total travel expenses	Cost of accommodation only	Names of family members in your household who travelled
Trip 1			\$	\$	
Trip 2			\$	\$	
Trip 3			\$	\$	
Trip 4			\$	\$	
Trip 5			\$	\$	
Trip 6			\$	\$	
Trip 7			\$	\$	
Trip 8			\$	\$	

Working From Home

Primary Spouse

Did you work from home in 2021 due to the COVID-19 pandemic or as required by your employer for more than 50% of the time for a period of at least four consecutive weeks in 2021?	Yes No	Yes No
Number of days you worked from home in 2021 (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 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 Teachers/Early Childhood Educator school supplies	
Self-Employment income & related expenses		
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 in your proprietorship or partnership without a tax slip:	Medical expense including premiums paid to a private health services plan i.e. Alberta Blue Cross	
Canada Emergency Wage Subsidy (CEWS) Canada Recovery Hiring Program (CRHP) Canada Emergency Rent Subsidy (CERS) Canada Emergency Business Account (CEBA) Hardest-Hit Businesses Recovery Program (HBRP) Tourism and Hospitality Recovery Program (THRP) Regional Relief and Recovery Fund (RRRF)	Digital News Subscription Tax Credit: Do you subscribe to a Qualifying Digital News Subscription? If yes, provide your receipt.	
	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:	
Other Slips:		

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 2021 slips please provide details of any missing information.