

## PERSONAL TAX CHECKLIST

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

<b>Primary Contact Information</b> <p>Name: _____</p> <p>Social Insurance No.: _____</p> <p>Date of Birth: _____</p> <p>Phone: _____</p> <p>Email: _____</p>	<b>Spouse Information (if applicable)</b> <p>Name: _____</p> <p>Social Insurance No: _____</p> <p>Date of Birth: _____</p> <p>Phone: _____</p> <p>Email: _____</p>
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<p><b>Current mailing address:</b> _____</p> <p><b>Previous mailing address &amp; date of move:</b> (If moved during the year) _____</p> <p><b>Province of residence as of December 31<sup>st</sup>:</b> _____</p> <p><b>Northern residents deduction to claim:</b>  <input type="checkbox"/> Full   <input type="checkbox"/> Half   <input type="checkbox"/> None       </p>	<p><b>Marital Status:</b>   <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><b>Did either of the following change during the year?</b></p> <p><input type="checkbox"/> Marital Status: _____  <small>(If yes, provide date of change)</small></p> <p><input type="checkbox"/> Last Name: _____  <small>(If yes, provide new last name)</small></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?	Yes	No	Yes	No
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 <b>VOID</b> 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 <b>more than 50% of the time for a period of at least four consecutive weeks in 2020?</b>	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 <b>claim \$2/day?</b> (Employer certification and receipts are NOT required)	Yes	No	Yes	No
Do you choose to claim the detailed method and claim actual expenses? <b>(Amount of actual expenses and a T2200S form completed and signed by your employer is required)</b>	Yes	No	Yes	No
Did your employer reimburse <b>ALL</b> of your home office expenses?	Yes	No	Yes	No
Did your employer reimburse <b>SOME</b> 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
	<b>NEW</b> Digital News Subscription Tax Credit: Do you subscribe to a Qualifying Digital News Subscription? If yes, provide your receipt.
Other Income / Missing tax slips	<b>NEW</b> 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.