

2020 Tax Return Checklist

Please ✓ all that apply to you

Additional processing time is required where foreign investment reporting or special elections are required.

You might not receive some Tax Slips until March 31st, such as T3's from mutual funds and T5013's from partnerships.

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| <ul style="list-style-type: none"><input type="checkbox"/> T3 - Investment or trust income<input type="checkbox"/> T4 - Wages or Salary<input type="checkbox"/> T5 - Investment income<input type="checkbox"/> T4A - OAS, CPP, or other income<input type="checkbox"/> T4E - Employment Insurance<input type="checkbox"/> T4RSP - RRSP income<input type="checkbox"/> T4RIF - Annuity income<input type="checkbox"/> RC62 - Universal Childcare Benefit<input type="checkbox"/> T5013 - Partnership income or tax shelters<input type="checkbox"/> T2200 - Employee Expenses<input type="checkbox"/> T2201 - Disability Certificate signed by Doctor<input type="checkbox"/> T2202A - Tuition credits for you or your child (Many universities no longer print these but make them available online)<input type="checkbox"/> Union and professional dues<input type="checkbox"/> RRSP contributions, Home Buyer or Life<input type="checkbox"/> Long Learning plan transactions<input type="checkbox"/> Property Taxes and rent paid receipts<input type="checkbox"/> Alimony paid or received<input type="checkbox"/> Charitable and Political Donations<input type="checkbox"/> Medical expenses, attendant care, nursing home for you or any dependents. Annual prescription summaries can be obtained from your pharmacy. | <ul style="list-style-type: none"><input type="checkbox"/> Interest paid on student loans or to earn income<input type="checkbox"/> Investment counsel fees (non-RRSP)<input type="checkbox"/> Political Contributions to Federal or Provincial parties and candidates<input type="checkbox"/> Child Care expenses include name, address and S.I.N. of babysitters<input type="checkbox"/> Adoption expenses<input type="checkbox"/> Public Transit Pass (monthly or longer). Ontario has a new public transit pass credit for seniors<input type="checkbox"/> Moving expenses (new residence 40km closer to new work location or school)<input type="checkbox"/> Tradesperson's Tools costing more than \$1,000<input type="checkbox"/> Teacher eligible supplies expenses<input type="checkbox"/> Tax instalments paid<input type="checkbox"/> NOT a Canadian Citizen or Resident<input type="checkbox"/> US citizen or green card holder<input type="checkbox"/> Notice of Assessment and/or reassessment for prior year (This is not usually necessary but always helpful)<input type="checkbox"/> Changes in address or marital status<input type="checkbox"/> Name, date of children born<input type="checkbox"/> Spouse's net income, if we are not preparing your spouse's tax return<input type="checkbox"/> Dispositions of capital property such as stocks, mutual funds, real estate including your principal residence | <ul style="list-style-type: none"><input type="checkbox"/> Did you move into your rental property, or did you move out of your home and rent it out?<input type="checkbox"/> Rental or business income and expenses<input type="checkbox"/> Held foreign property at any time in tax year with a total cost of >\$100,000 CAD? This includes foreign stocks unless they are held in a registered account such as an RRSP.<input type="checkbox"/> Any other income or expense including foreign amounts<input type="checkbox"/> Parent, grandparent, infirm child, or relative over 18 supported by you (Canada Caregiver Amount)<input type="checkbox"/> New dependents (children, parents, grandparents, other relatives). Please provide Name, Date of Birth, SIN<input type="checkbox"/> First-time home owner in tax year where you or your spouse did not own in previous 4 calendar years<input type="checkbox"/> Did you sell your home?<input type="checkbox"/> Please do NOT provide my information to Elections Canada. <p>Keep in mind, your taxes are due April 30th 2021.</p> <p>Need support?
Give us a call:
519-822-5307</p> |
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You have the vision. We have the focus.

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