ESG Chartered Professional Accountants 2020 Personal Tax Return Checklist

Please use this checklist as a guide in preparing your documentation for the preparation of your personal tax return. It is important to prepare and file a complete tax return to avoid penalties later in the year.

Personal Information

Name		SIN	Date of Birth	
Taxpayer				
Spouse				
Address			Email or Print T Return (Circle)	ax
Email				
Daytime Phone				
Evening Phone				
If your marital statu Residence What was your Pro Did you immigrate	Married Single Common-law us changed during the year, provide date of ch ovince or Territory of residence on December 3 to Canada or emigrate from Canada during th e of entry into Canada	nange: 31 st , 2020? ne year?	□ Yes	□ No
Elections Cana	ada			
Are you a Canadia		□ Yes	🗆 No	
	norize the CRA to provide your name, address in the National Register of Electors?	s and date of birth to El	ections Canada	to update
Foreign Repor	ting			

Did you own or hold foreign property with a total cost of \$100,000 Canadian or more at any time during the year? If so, please provide details.

Dependents

Name	Relationship	Date of birth	SIN	Disability?	Income

Income

T4 Slips – Employment income	□ Yes	🗆 No
T4A Slips – Commission, self-employment, pension and scholarships	□ Yes	🗆 No
T4AP Slips – Canada Pension Plan benefits	□ Yes	🗆 No
T4A(OAS) Slip – Old Age Security	□ Yes	🗆 No
T4E Slips – Employment insurance	□ Yes	🗆 No
T4PS Slips – Profit Sharing Plans	□ Yes	🗆 No
T4RSP Slips – RRSP income/withdrawals	□ Yes	🗆 No
T4RIF Slips – RRIF income/withdrawals	□ Yes	🗆 No
T5 Slips – Investment income	□ Yes	🗆 No
T3 Slips – Income from trust allocations	□ Yes	🗆 No
T5013 Slips – Partnership income	□ Yes	🗆 No
T5008 Slips – Income from security transactions	□ Yes	🗆 No
T5007 Slips – Social assistance and workers compensation	□ Yes	🗆 No
Details on the sale of unregistered stocks, bonds, mutual funds, etc	□ Yes	🗆 No
Foreign income	□ Yes	🗆 No
Details of rental income and expenses	□ Yes	🗆 No
Details of self-employed income and expenses	□ Yes	🗆 No
Details on spousal support income or expense	□ Yes	🗆 No
Any other income to report not reported on a slip (eg. CERB or CEWS)	□ Yes	🗆 No
Deductions and Tax Credits		
RRSP contributions	□ Yes	🗆 No
Child care expenses	□ Yes	🗆 No
Union, professional or association dues (for which not reimbursed)	□ Yes	🗆 No
Moving expenses	□ Yes	🗆 No
Carrying charges (interest and accounting fees)	□ Yes	🗆 No
Employment expenses (T2200 from employer required)	□ Yes	🗆 No
Did you have to work from home due to Covid ?		🗆 No
	□ Yes	
Northern resident deduction and travel expenses	∐ Yes □ Yes	□ No
Northern resident deduction and travel expenses Caregiver credit		
	□ Yes	□ No
Caregiver credit	□ Yes □ Yes	□ No □ No
Caregiver credit Did you receive the \$200.00 senior's credit in 2020?	□ Yes □ Yes □ Yes	□ No □ No □ No
Caregiver credit Did you receive the \$200.00 senior's credit in 2020? Disability credit	□ Yes□ Yes□ Yes□ Yes	 No No No No
Caregiver credit Did you receive the \$200.00 senior's credit in 2020? Disability credit Interest paid on student loans	 □ Yes □ Yes □ Yes □ Yes □ Yes 	 No No No No No
Caregiver credit Did you receive the \$200.00 senior's credit in 2020? Disability credit Interest paid on student loans T2202A Slips – Tuition paid	 Yes Yes Yes Yes Yes Yes Yes 	 No No No No No No No
Caregiver credit Did you receive the \$200.00 senior's credit in 2020? Disability credit Interest paid on student loans T2202A Slips – Tuition paid Medical expenses	 Yes Yes Yes Yes Yes Yes Yes Yes 	 No No No No No No No
Caregiver credit Did you receive the \$200.00 senior's credit in 2020? Disability credit Interest paid on student loans T2202A Slips – Tuition paid Medical expenses Charitable donations	 Yes 	 No No No No No No No No No
Caregiver credit Did you receive the \$200.00 senior's credit in 2020? Disability credit Interest paid on student loans T2202A Slips – Tuition paid Medical expenses Charitable donations Political contributions	 Yes 	 No
Caregiver credit Did you receive the \$200.00 senior's credit in 2020? Disability credit Interest paid on student loans T2202A Slips – Tuition paid Medical expenses Charitable donations Political contributions Provincial credits – property tax and/or rent	 Yes 	 No