

Baumgartner & Company Chartered Professional Accountants

15736 100 Avenue NW, Edmonton, AB T5P 0L1

780.484.1133 Info@BandCompany.ca

Contact Information

Name: _____

Address: _____

Email Address: _____

Preferred Phone: _____

Other Phone: _____

Marital Status: _____

Dependents: _____

Do you agree to the use of secured electronic communications and signature? YES NO

Do you want CRA to contact you online? YES NO

CRA's online MyAccount feature provides you with information on your tax return, benefits, assessments, account balance, etc. By providing CRA with your email address, you authorize CRA to send you email notifications when there is mail to view on MyAccount. Any online correspondence will be presumed to have been received on the date of that email notification. You understand and agree that the Notice of Assessment and any future correspondence eligible for online delivery will no longer be printed and mailed.

Family Details

Did your marital status change during 2021? if so, what date?

You understand that you must inform CRA of your current marital status, including change of status by the end of the following month after your status changed. The only exception is if you have separated from a spouse or common-law partner due to a breakdown in the relationship, wait until 90 consecutive days have passed before reporting. For tax purposes, two people are considered common-law if they have lived together in a conjugal relationship either for at least twelve months; or immediately if they have a shared child by birth or adoption.

Were there any changes to your dependants in 2021? Please list any new dependents including name, birthdate, and SIN

Did you receive or make support payments during the year? Yes No

If eligible, do you wish to split pension income with your spouse? Yes No

Did you work from home due to COVID-19? Yes No

If so, provide the number of days worked from home: _____

Questions Required for Electronic Filing

Are you a Canadian Citizen? Yes No

Do you agree to Canada Revenue Agency providing your name, address, and date of birth to Elections Canada for the National Register of Electors? Yes No

Did you purchase a home in 2021? Yes No

Sale or Disposition of a Principal Residence or Other Real Property

Did you sell or dispose of your principal residence this year? Yes No

Did you sell or dispose of any other real property (cottage, vacation home, vacant land, etc.)? Yes No

Complete address of the property sold, including postal code (attach additional page, if required):

Year bought: _____ Sale price: _____ Purchase price: _____

Foreign Pensions

Did you receive a pension from a country other than Canada? Yes No

If yes, provide the following details for each pension received (attach additional pages, if required)

Country: _____ Amount: _____ Currency: _____

2021 T1 Foreign Property Reporting

Canadians who held certain property outside Canada with a total cost of more than \$100,000 CAD at any time during the tax year are subject to certain disclosure requirement to the Canada Revenue Agency (CRA). Non-compliance with this reporting requirement results in severe penalties.

Did you own any of the following at any time during 2021?

1. Money and/or other investments held in a foreign bank account (this does NOT include foreign currency held in a Canadian bank account)? Yes No
2. Full or partial ownership of real estate or other properties located in a foreign country? Yes No
3. Shares or stock in a foreign corporation? Yes No
4. Bonds issued by a foreign government or corporation? Yes No

Digital Assets

1. Did you purchase, trade, or sell any digital assets (including crypto currencies, NFTs, etc.)? Yes No
2. Did you participate or assist in any way with the digital mining of crypto currencies? Yes No

As taxpayer, I acknowledge that neglecting to report the above items may incur substantial penalties and interest charges. I agree to indemnify and hold harmless Baumgartner & Company Chartered Professional Accountants and its partners, agents or employees, from any and all losses, costs, damages, expenses, claims, demands and liabilities arising due to a misrepresentation by me. I agree that the above information is correct and complete.

Signature

Date

Please complete, sign, date and return this form to:

Baumgartner & Company **Chartered Professional Accountants**

15736 100 Avenue NW, Edmonton, AB T5P 0L1

Tel: 780.484.1133 Email: Info@BandCompany.ca Fax: 780.486.4393

Email us for a private link to a secure online portal for uploading electronic documents.

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SUPPORTING DOCUMENTATION FOR 2021 PERSONAL INCOME TAX

Income

- First year for CPP, OAS?
- T4 for employment income
- T4E for employment insurance benefits
- T4RSP for RRSP withdrawals
- T5007 for government benefits
- T5013 for partnership income
- Rental property revenue and expenses (including short term rental such as AirBnB)
- Business income and expenses
- Self-employed income and expenses (including Instacart, Uber, Doordash, Lyft, Rover, etc.)
- Details of foreign income or other pensions received
- Online revenue (including Google Ads, Instagram, Amazon sales, Etsy, etc.)
- Details of the purchase/sale of digital assets (including crypto currencies, NFT's, etc.)
- T3 for trust income
- T4A for other income and/or pandemic benefits
- T4P for pension income
- T5 for investment income
- T5008 for sale of securities
- Spousal and/or child support received

Receipts/Expenses

- RRSP contributions
- Charitable donations
- Long-term care (detailed receipt from facility)
- Child care
- T2202 tuition fees
- T2200 employment expenses
- T2200S Work-from-Home employment expenses
- TL2 Claim for Meals and Lodging Expenses (for transport employees including truck drivers)
- Medical expenses, including extended health and/or travel medical insurance plan premiums
- Union or professional dues
- Political contributions
- Digital News Media subscriptions
- Student loan interest
- Moving expenses
- Spousal and/or child support paid
- Investment expenses (interest, management fees)

Please let us know if you are interested in obtaining more information about the Disability Tax Credit (DTC).

The DTC is a non-refundable tax credit that helps persons with disabilities or their supporting persons reduce the amount of income tax they may have to pay. The purpose of the DTC is to provide for greater tax equity by allowing some relief for disability costs, since these are unavoidable additional expenses that other taxpayers don't have to face. Eligibility is determined based upon a form completed by your medical practitioner and reviewed by Canada Revenue Agency. To qualify, a person must have an impairment in their health that is prolonged (minimum of 12 months in duration) and be present at least 90% of the time.

ALL information gathered will be maintained in accordance with our privacy policy. This checklist is meant to act as a reminder of the information to be included in preparing a 2021 Canadian personal income tax return.

Due to timing restrictions, our firm cannot guarantee the completion of your taxes by the May 2nd deadline if all information has not been received in our office by April 20th.