

NEW CLIENT

2020 TAX FILING INFORMATION SHEET

	First Name	Last Name	SIN	Date of birth (yyyy/mm/dd)	Contact Number
Taxpayer					
Spouse					
Address					
Marital Status	<input type="checkbox"/> Single	<input type="checkbox"/> Married	<input type="checkbox"/> Common-law	<input type="checkbox"/> Widowed	<input type="checkbox"/> Divorced <input type="checkbox"/> Separated

If there was any change in your marital status during 2020, provide the date of change (yyyy/mm/dd) _____

Was there any change in the number of your dependents during 2020? Yes / No: _____

Canadian Citizens? Yes/No _____. Do you want to provide information to Elections Canada? Yes/NO _____

Whether taxpayer/spouse is self-employed (e.g. real estate agent, mortgage specialist, taxi/uber driver etc)? Yes/No _____

Does the taxpayer/spouse own foreign investments / property (cost of which is over CAD \$100,000)? _____

Did the taxpayer / spouse sell any (principal or rental) real estate property during 2020? Yes/No _____

Did the taxpayer / spouse **immigrate to** Canada or **emigrate from** Canada in **2020**? Yes/No __ Date of entry/exit _____

LIST OF DEPENDENTS (children / parents / other persons with disability – conditions apply)

First and Last name	Date of birth (YYYY/MM/DD)	SIN # (if available)	Relationship to client

PROPERTY TAXES / RENT PAID

Address	Months	Rent paid	Prop. Tax	Name of Landlord/Municipality

Checkmark Applicable Items

<p><u>INCOME</u></p> <p><input type="checkbox"/> T3 Income from trust</p> <p><input type="checkbox"/> T4 Employment Income</p> <p><input type="checkbox"/> T4 Employment Insurance Income</p> <p><input type="checkbox"/> T4A Pension, Retirement, Annuity, and Other Income</p> <p><input type="checkbox"/> T4RSP, T4RIF</p> <p><input type="checkbox"/> T5 Investment income</p> <p><input type="checkbox"/> T5007 Statement of Benefits</p> <p><input type="checkbox"/> T5008 Statement of Securities Transactions</p> <p><input type="checkbox"/> T5018 Statement of Contract Payments</p> <p><input type="checkbox"/> T5013 Statement of Partnership Income</p> <p><input type="checkbox"/> Foreign pensions</p> <p><input type="checkbox"/> Amount of spousal support received</p>	<p><input type="checkbox"/> Self employment income</p> <p><input type="checkbox"/> Rental income and expenses.</p> <p><input type="checkbox"/> Capital gains</p> <p><input type="checkbox"/> Income from foreign assets / sources</p> <p><u>DEDUCTIONS</u></p> <p><input type="checkbox"/> RRSP contribution slips (March to Dec 2020 and Jan to Feb 2021)</p> <p><input type="checkbox"/> Child care expense receipts</p> <p><input type="checkbox"/> Amount of spousal support paid</p> <p><input type="checkbox"/> Moving expenses</p> <p><input type="checkbox"/> Employment expenses - T2200</p> <p><input type="checkbox"/> TL2 meals & lodging for transportation employees</p>	<p><input type="checkbox"/> Legal fees paid to establish spousal support</p> <p><input type="checkbox"/> Legal fees paid to recover wages from your employer</p> <p><input type="checkbox"/> Home office expenses (COVID19 related) new</p> <p><u>COMMON CREDITS</u></p> <p><input type="checkbox"/> Tuition fee slips (T2202A / TL11)</p> <p><input type="checkbox"/> Medical expense</p> <p><input type="checkbox"/> First time home buyer</p> <p><input type="checkbox"/> Donations</p> <p><input type="checkbox"/> Student loan interest receipts</p> <p><input type="checkbox"/> Disability tax credit - T2201</p> <p><input type="checkbox"/> Home Accessibility Credit</p>
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Client Signature _____ Date _____