

PEVERILL & ASSOCIATES INCORPORATED

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PERSONAL INCOME TAX RETURN CHECKLIST 2020

***Unless we have the information to complete your return by April 15th, we cannot guarantee that it will be completed before April 30th.

THE FOLLOWING SLIPS MUST BE FILED WITH CANADA REVENUE AGENCY :

- T4 slip from each employer during 2020
- T5 slip for all interest and dividends received in 2020
- Receipt for each charitable donation made in the year
- Old Age Security received
- Print-out for each medical expense paid in the year (you can get an annual summary from your pharmacist, dentist, etc.)
- T4A for any pension received in the year
- Receipt for all RRSP contributions made in year or by March 1, 2021
- T2202A form for tuition receipts
- T3 slips for any income from mutual fund investments
- **Medical and dental premiums paid in 2020, make sure this number does not include life or disability insurance.**

RECEIPTS DO NOT HAVE TO BE SENT FOR THE FOLLOWING INFORMATION BUT SHOULD BE KEPT ON FILE :

- Child care expenses, including Social insurance number and name of caregiver.
- Receipts for interest paid in the year on student loans.
- Details on the purchase price and proceeds on any investments sold in the year.
- If you sold a house in 2020, year of purchase and the proceeds received.

THE FOLLOWING INFORMATION IS REQUIRED IF YOU ARE CLAIMING EMPLOYMENT EXPENSES OTHER THAN THE STANDARD \$2 PER DAY

- T2200 from your employer, including business mileage and personal mileage is claiming vehicle expenses
 - Totals for each expense that you are claiming such as gas, travel, office, advertising, etc. ▪ Meals and entertainment amounts.

OFFICE HOURS :

For the months of March and April: 8:30am – 5:30pm

For the months of May and June: 8:30am – 4:30pm

PEVERILL PORTAL

We have a safe method for you to upload your documents rather than sending email. Check out www.peverill.ca/join-the-portal.html to sign up for this free service.