



## 2020 PERSONAL TAX CHECKLIST

| PERSONAL INFORMATION  |  |             |   |              |  |
|---|--|-------------|---|--------------|--|
| First name:   |  |             | Last name:  |              |  |
| Street address:   |  | City:       | Prov:   | Postal code: |  |
| Birthdate:  |  |             | SIN:  |              |  |
| Home phone:   |  | Cell phone: | Work phone:   |              |  |
| Email 1:  |  |             | Email 2:  |              |  |
| Marital status: Single Common Law Married Separated Divorced Widowed                |  |             |   |              |  |
| Did your marital status change during the year? Please provide date, if applicable: |  |             |   |              |  |
| Canadian citizen: Yes No  |  |             | US citizen/resident: Yes No (If yes, please complete pg. 3) |              |  |
| If NO above, are you a non-resident of Canada? Yes No                               |  |             | SSN/ITIN:   |              |  |

| COMPLETING RETURN FOR SPOUSE/PARTNER   |  |
|--|--|
| Completing return for spouse/partner: Yes No<br>(provide spouse's net income – line 236 of return) | If yes, please complete a separate checklist for spouse.<br>\$ |
| Spouse/partner first name:   | Last name:   |
| Birthdate:   | SIN:   |

| DEPENDANTS (CHILDREN OR SENIOR PARENT LIVING WITH YOU)       |                        |              |           |     |            |
|--|------------------------|--------------|-----------|-----|------------|
| Do you have a shared custody arrangement for the dependants? |                        |              |           |     | Yes No     |
| Name   | Address (if different) | Relationship | Birthdate | SIN | Net Income |
|  |                        |              |           |     |            |

| QUESTIONS TO ANSWER  |  |
|--|--|
| Did you apply for or received any COVID-19 support? (If yes, please complete pg. 4)  | Yes No   |
| Do you want to provide your address and information to Elections Canada?   | Yes No   |
| Do you own investments or real estate outside of Canada with cost exceeding \$100,000CDN?  | Yes No   |
| Did you receive any income or distributions from foreign entities including trusts?  | Yes No   |
| Did you receive interest, dividends or benefits from a business in which a relative is a key party in terms of ownership or involvement? | Yes No   |
| Were you a first time homebuyer in 2020?   | Yes No   |
| Have you sold real estate property in 2020?  | Yes No   |
| If yes, was it your principal residence?   | Yes No   |
| If you sold your principal residence in 2020 please provide the following:   |  |
| Date of original purchase:   | Proceeds of disposition:                      Ownership: |
| Did you purchase NEW residential property in 2020?   | Yes No   |
| Did you apply for GST/HST rebate?  | Yes No   |
| If newcomer to Canada, please provide date of entering the country:  |  |
| Did you leave Canada in 2020?  | If so, please provide the exit date:                     |

**IF THIS IS YOUR FIRST YEAR FILING WITH US,  
PLEASE PROVIDE A COPY OF YOUR PREVIOUS YEAR'S TAX RETURN**

**PLEASE CHECK THE ITEMS THAT APPLY TO YOU**

**Personal Income**

- T4, T4A – Salaries and employment
- Other employment income or benefits
- T4A (P) – Canada Pension Plan benefits
- T4A (OAS) – Old Age Security benefits
- T4A – Other pension or superannuation
- T4RSP – RRSP income
- T4RIF – RRIF income
- T4E – Employment Insurance benefits
- T5007 – WCB benefits/social services benefits
- T1137 – Home Buyers Plan
- T4RCA – retirement income
- Foreign Pension
- T4A or T4E for COVID-19 payments

**Other income**

- Alimony received
- Taxable child support received
- Scholarships/bursaries
- Executor fees
- Lump-sum distributions from foreign plans
- Other – specify

**Non-refundable Credits**

- Spousal amount – spouse’s net income
- Equivalent to married amount (full details required)
- Disability deductions (T2201 must be filed)
- T2202/TL11 – tuition fees
- Education credit for dependant (Dependant’s net income \$ )
- Did you take any occupational-skills courses?
- Medical receipts
- Costs for medical intervention to conceive a child (ask for details)
- Charitable donations
- Attendant care expenses
- Limited partnership losses of other years
- Political contribution receipts
- Canada caregiver for infirm dependant (details of infirmity required)
- Home Accessibility Tax Credit
- Eligible Educator School Supply Tax Credit
- Digital News Subscription Tax Credit

**Investment Income**

- T3, T5, T4S – Interest and Dividends
- T5008 – Statement of Security Transactions
- Interest on Tax Refunds received from CRA
- T600 – Canada Savings Bonds
- Annuities
- Rental income (full details required)
- Short-term vacation rentals (i.e. AirBnB)
- Summary of investment contract holdings
- T5013 – Limited partnership income (loss)
- Capital gain/losses (full details required)
- Sale of personal property with gain
- Sale of bitcoins/cryptocurrency
- Foreign income (fill out pg. 3)

**Business**

- Self-employment income/loss (please fill out Self-employment worksheet)
- Farming/fishing income/loss
- Professional income/loss
- Internet Business Activities income/loss

**Deductions**

- RRSP
- Union/professional dues
- Alimony paid
- Deductible child support paid
- Interest paid on student loans (statement required)
- Interest and carrying charges on investments
- Investment counsel and accounting fees
- Employment expenses (details required, form T2200 or T2200S)
- Deductible legal fees
- Child care expenses (receipts required)
- Moving expenses (details required)
- TL2 – Claim for boarding and lodging
- Home Buyers Plan
- Clergy residence deduction T1223

**Other Items**

- Prior year Notice of Assessment
- Installment payments for current year
- Details of foreign property owned at any time in 2020



**COMPLETE ONLY IF YOU ARE A U.S. CITIZEN, U.S. RESIDENT, OR YOU OWN FOREIGN PROPERTY AND/OR HAVE FOREIGN INCOME:**

**PLEASE CHECK THE ITEMS THAT APPLY TO YOU**

**Income from US Sources**

- W-2 Employment Income
- 1099 (various) Investment and Other Income
- 1042-S Foreign Person's US Source Income Subject to Withholding
- SSA-1099 or SSA-1042-S Social Security Benefits
- 8288-A Disposition of US Real Estate
- K-1 Partner's Shareholder Share of Income, Credit and Deductions, etc.
- K-1 S-Corp Shareholder Share of Income, Credit and Deductions, etc.
- K-1 Estate and Trust Beneficiary Share of Income, Credit and Deductions, etc.

**Expenses and Deductions**

- 1095-A Health Insurance Marketplace Statement
- 1098 Mortgage and Interest Statement
- 1098-T Tuition Statement

**DISCLOSURE**

Are you a U.S. Green card holder? Yes No

If status was received during the year, please specify the date:

If not a U.S. citizen or green card holder, please specify Visa type in the U.S.:

Days spent in the U.S. in                    2018:                    2019:                    2020:

If a U.S. citizen, please provide the date of moving to Canada:

If moved to the U.S., please provide the date:

Do you own 10% or more of the shares of a Canadian corporation or a corporation located outside of the U.S.? Yes No

Do you have investments in Canadian Mutual Funds? Yes No

Do you have a Tax-Free Savings Account (TFSA) in Canada? Yes No

Do you have a Registered Education Savings Plan (RESP) for your children? Yes No

Did you have the amount of \$10,000USD or more at any time during the year that was held in financial institution(s) located outside of the U.S.? Yes No

If you answered YES, would you like our firm to file FBAR for you? Yes No

Did you own \$200,000USD or more held in financial assets outside of the U.S. at the end of the year, or \$300,000USD anytime during the year? Yes No

Are you a member of a Canadian Partnership? Yes No

Are you a trustee of a Canadian trust or an executor of the estate of a Canadian or U.S. resident? Yes No

Have you received any gifts or given gifts over \$14,000 during the year? Yes No

Do you have Roth – IRA? Yes No

If your child is a US citizen, please provide his/her SSN:

If your child is adopted, please provide date of adoption:

**COVID-19 SUPPORT**

**Multiple period federal payments**

- CERB (Canada Emergency Response Benefit)
- CESB (Canada Emergency Student Benefit)
- EI (Employment Insurance) regular benefit
- CRB (Canada Recovery Benefit)
- CRSB (Canada Recovery Sickness Benefit)
- CRCB (Canada Recovery Caregiving Benefit)

**Slip**

T4A/T4E  
T4A  
T4E  
T4A  
T4A  
T4A  
T4A

**Business/property federal support**

- 10% Temporary Wage Subsidy
- CEWS (Canada Emergency Wage Subsidy)
- CERS (Canada Emergency Rent Subsidy)
- CEBA (Canada Emergency Business Account)
- CECRA (Canada Emergency Commercial Rent Assistance)

N/A  
N/A  
N/A  
N/A  
N/A

**Other support**

- Social assistance
- Payments received from other sources (charitable organizations, etc.)

T5007  
N/A

**QUESTIONS TO ANSWER**

Did you work from home more than 50% of the time for at least 4 consecutive weeks in 2020 due to COVID-19 and not fully reimbursed for your expenses? Yes No

If YES, please provide number of days you worked from home in 2020: