

Tax Preparation Checklist

Name : _____

Spouse : _____

SIN : _____ - _____ - _____

SIN : _____ - _____ - _____

DOB : (mm/dd/yyyy) _____

DOB : (mm/dd/yyyy) _____

Phone : () -

Phone : () -

Cell : () -

Cell : () -

Email : _____

Email : _____

Address : _____

NEW CLIENTS: Please provide copy of identification and a cheque (if adding/changing Direct Deposit information) and complete an Authorization Request.

Marital Status:

Married Common-law Widowed Divorced Separated Single

Marital Status Change Date of Change: (mm/dd/yyyy) _____

Dependents

Name	Relationship	Date of Birth (dd/mm/yyyy)	Social Insurance Number	Income	Qualifies for Disability	Post- Secondary Education	Attends Daycare/ Preschool
					Y or N	Y or N	Y or N
					Y or N	Y or N	Y or N
					Y or N	Y or N	Y or N
					Y or N	Y or N	Y or N
					Y or N	Y or N	Y or N

Sale of Real Estate

Sale of Property 1

Principal Residence Other Mixed-Use

Owned multiple properties during same period

Address: _____

Year Purchased: _____

Purchase Price: \$ _____

Sale Price: \$ _____

Sale of Property 2

Principal Residence Other Mixed-Use

Owned multiple properties during same period.

Address: _____

Year Purchased: _____

Purchase Price: \$ _____

Sale Price: \$ _____

Tax returns are e-filed upon receipt of payment

Maximize your refund!

Please check all that apply to your income tax situation. We may request additional information.

Are you a Canadian citizen? Yes __ No __
Did you hold foreign property or securities with a total cost of over \$100,000? Yes __ No __
Did you receive any government Covid-19 benefits or services during 2020? Yes __ No __

INCOME RECEIPTS & SLIPS

T4 (employment) T5007 (WSIB, OW, ODSP) T5008
 T4A (pension or other income) T4RSP T4PS
 T4A(P) - CPP T4RIF T5013
 T4A(OAS) T3 (investments) T5018 (contract payments)
 T4E – Employment Insurance T5 (interest & dividends) other income
 Self employment – see Self Employed Worksheet on website or in office.
 Rental income – see Rental Properties Worksheet on website or in office.

CREDITS & DEDUCTIONS

Did you work from home for more than 50% of the time for 4 or more consecutive weeks due to Covid-19? Yes __ No __
If yes to the above, how many days did you work from home during 2020 due to Covid-19? # of days _____
Do you wish to claim Work-space-in-the-home expenses? (You may require form T2200 or T2200S) Yes __ No __

Disability Tax Credit (on file with CRA) First time home buyer
 Medical expenses Home Buyers Plan participant
 Charitable donations Lifelong Learning Plan participant
 Union or professional dues Senior Public Transit receipts
 RRSP contributions (include Jan & Feb of current year) Teachers school supply (receipts & letter/T2200)
 Childcare expenses (provide SIN if an individual) Firefighter or Search & Rescue credit
Name: _____ \$ _____ Completed TL2 – long haul truck driver
Name: _____ \$ _____ T2200/ T2200S – see Employment Expenses Worksheet
 Child support – received or paid? (circle applicable) Moving expenses (certain conditions need to be met)
Name: _____ \$ _____ T2202 - tuition
 Spousal support – received or paid? (circle applicable) Student loan interest
Name: _____ \$ _____ Home accessibility credit (>64 or approved DTC)
 Legal agreement for custody or support Vehicle modification credit (>64 or approved DTC)
 Adoption expenses Capital gains/losses information
 Caregiver credit - Name of dependant: _____ Capital/non-capital losses of other years
 Receipts for Property taxes or Rent (circle applicable) Real or deemed sale of stocks, bonds or real estate
Address: _____ Legal expenses (to commence or change support)
Dates at that location: _____ Other (provide information)
Amount paid in 2020: _____ Installment payments made to the CRA
Municipality/Landlord: _____

CLIENT SIGNATURE: _____