

**PERSONAL TAX CHECK LIST**

For the year

Please complete this check list and provide all applicable slips, lists, and other supplemental information before you submit.

**Personal Information**

Name	SIN	Date of Birth	Work Phone	Ext
Taxpayer				
Spouse				
Address			Home	
			Mobile	
Email				

Marital Status:

Married  Single  Common-law  Separated  Divorced  Widowed

If marital status changed during the year, provide date of change (yyyy/mm/dd):

**Residence**

Province or territory of residence on December 31

Did the taxpayer immigrate to Canada or emigrate from Canada during the year?

If yes, provide date of entry into Canada

or date of departure

Did you dispose of property in the tax year you are filing for which you are claiming a principal residence exemption?

Yes

No

**Elections Canada**

Is the taxpayer a Canadian citizen?

Yes

No

If yes, the taxpayer authorizes the CRA to provide name, address and date of birth to Elections Canada

to update the National Register of Electors.

Yes

No

**Foreign Reporting**

Did the taxpayer own specified foreign property at any time during the year with a total cost of more than CDN\$100,000 ? If yes, please provide a list.

Yes

No

**Change in Personal or Financial Situation During the Year**

Date the taxpayer declared bankruptcy during the year.

**Dependants**

Name	Relationship	Date of Birth	SIN	Disability Amount	Income	Child Care Expenses

**General Income/Deductions**

T4 slips – Employment income?

Yes

No

T4A – Commission and self-employment?

Yes

No

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T4E – Employment insurance?  Yes  No

T5007 – Social assistance?  Yes  No

Employment income or taxable benefits not shown on the T4 slip?

Amount paid for union & professional dues and organization names?

List of child care expenses, with receipts, for each child?  Yes  No

List of moving expenses paid in the year? If applicable.  Yes  No

List of support payments made or received?  Yes  No

List of deductible employment expenses?  Yes  No

Is a signed form T2200 or T2200S attached?  Yes  No

**Pension Income**

T4A – Pension, retirement and annuity income?  Yes  No

T4AP – Canada pension plan benefits?  Yes  No

T4A(OAS) Old age security pension slip/foreign pensions?  Yes  No

T4RSP – Registered retirement savings plan income?  Yes  No

T4RIF – Registered retirement income fund income?  Yes  No

Does the taxpayer elect to split eligible pension income, If beneficial, with spouse or common-law partner?  Yes  No

**Investment Income/Deductions**

T3 – Income from trust allocations?  Yes  No

T5 – Investment income?  Yes  No

T4PS – Income from profit sharing plans?  Yes  No

T5013/T5013(A) – Partnership income?  Yes  No

T5008 – Income from securities transactions?  Yes  No

Did the taxpayer dispose of property during the year? If so, provide the following details in a separate list:

Description of Property	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal
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Other Investments, bitcoin or other cryptocurrency transactions.  Yes  No

Interest paid to earn investment income.  Yes  No

**Self-Employment/Business Income**

Financial statement(s)/ schedule of revenue and expenses attached?  Yes  No

Has the taxpayer registered to be eligible for Employment Insurance special benefits?  Yes  No

If an owner/manager, did the taxpayer have a shareholder loan outstanding during the year?  Yes  No

If yes, provide details of borrowings and repayments:  Yes  No

If the taxpayer used a vehicle for business, are the vehicle expenses and both total and business mileage attached?  Yes  No

If the taxpayer used a portion of his/her home for business, are the home expenses and both total and business square footage attached?  Yes  No

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Is a list of all new asset additions attached?  Yes  No

**Rental Income**

If the taxpayer owned rental property, is a statement of rental income attached?  Yes  No

Other rental income including all amounts received from the sharing economy, such as AirBnB, VRBO, Uber, etc.,  Yes  No

**RRSP Contributions**

Contributions receipts attached?  Yes  No

**Other Credits**

T2202 – Tuition/education amount for taxpayer?  Yes  No

T2202 – Tuition/education amount claimed on transfer from dependant?  Yes  No

Receipt or amount for taxpayer’s student loan interest?  Yes  No

Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependants?  Yes  No

Receipts for charitable donations or donations made by way of gifting an item in kind?  Yes  No

Receipts for political contributions?  Yes  No

First time home buyer? If yes, please provide information.  Yes  No

**Prior Year Tax Return Information/Correspondence**

If new to the firm, are tax returns (and corresponding Notices of Assessment) for the last three years attached ?  Yes  No

If taxpayer claimed a loss carryback in any of the preceding 3 years, are the Notices of Reassessment for those years attached?  Yes  No

Is a copy of any other correspondence from the Canada Revenue Agency attached?  Yes  No

If you would like your tax refund deposited directly into your account, is a void cheque attached?  Yes  No

Is your statement of instalments paid for the year attached?  Yes  No

**COVID-19 TAX RELATED ISSUES**

Please provide:

1. All income, support, and benefits received under COVID-19 relief programs.

Covid-19 related Federal personal and business support programs **that are taxable**:

Canada Emergency Response Benefits (CERB)  Yes  No

Canada Recovery Benefit (CRB)  Yes  No

Canada Recovery Sickness Benefit (CRSB)  Yes  No

Canada Recovery Caregiving Benefit (CRCB)  Yes  No

Canada Emergency Student Benefit (CESB)  Yes  No

Canada Emergency Wage Subsidy (CEWS)  Yes  No

Canada Emergency Rent Subsidy (CERS)  Yes  No

Canada Emergency Business Account (CEBA)\*  Yes  No

\*Forgivable portion is taxable.