

# 2020 T1 Canadian Personal Income Tax Checklist

| IDENTIFICATION AND CONTACT INFORMATION (Taxpayer 1) |                    |                                  |             |         |
|---|--------------------|----------------------------------|-------------|---------|
| Full Name   | SIN                |                                  | Phone       |         |
| Birthdate MM/DD/YY                                  | Citizenship        |                                  | Email       |         |
| SPOUSE INFORMATION (Taxpayer 2)                     |                    |                                  |             |         |
| Full Name   | SIN                |                                  | Phone       |         |
| Birthdate MM/DD/YY                                  | Citizenship        |                                  | Email       |         |
| DEPENDENT(S)  |                    |                                  |             |         |
| Full Name   | Birthdate MM/DD/YY | SIN                              | Citizenship | Custody |
| Full Name   | Birthdate MM/DD/YY | SIN                              | Citizenship | Custody |
| IF ANY CHANGES                                      |                    |                                  |             |         |
| Current Address                                     |                    |                                  |             |         |
| Marital Status (as of Dec. 31/20)                   |                    | Date of Change in Marital Status |             |         |
| INVESTMENT ADVISOR                                  |                    |                                  |             |         |
| Name  | Email              |                                  | Phone       |         |

Preferred delivery method of COMPLETED tax return: ☐ Portal ☐ Email ☐ Mail/Courier

Please review the list of income and deductions/credits below, and check off those items that apply to you and your spouse.

| Taxpayer 1                    | Taxpayer 2               |   | Taxpayer 1               | Taxpayer 2               |  |
|-------------------------------|--------------------------|---|--------------------------|--------------------------|--|
| <b>Income</b>                 |                          |   |                          |                          |  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Employment Income (T4 or T4A Slips)                                       | <input type="checkbox"/> | <input type="checkbox"/> | Rental Income and Expenses   |
| <input type="checkbox"/>      | <input type="checkbox"/> | Pension Income (T4A, T4OAS, T4AP Slips)                                   | <input type="checkbox"/> | <input type="checkbox"/> | Capital Gains (Please indicate the cost and proceeds of any asset disposals)               |
| <input type="checkbox"/>      | <input type="checkbox"/> | Employment Insurance Benefits (T4E Slips)                                 | <input type="checkbox"/> | <input type="checkbox"/> | Self-Employment Income and Expenses  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Investment Income - Interest  | <input type="checkbox"/> | <input type="checkbox"/> | Retirement Income (RRSP, RRIF, Annuity)  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Dividends (T5 Slips)  | <input type="checkbox"/> | <input type="checkbox"/> | Other Income, Support Received, Death Benefits, etc  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Estate/Trust/Mutual Fund Income (T3 Slips)                                |                          |                          |  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Partnership Income (T5013)  |                          |                          |  |
| <input type="checkbox"/>      | <input type="checkbox"/> | COVID-19 benefits (T4A/T4E slips for CERB, CRB, CESB, CRCB, CRSB)         |                          |                          |  |
| <b>Deductions and Credits</b> |                          |   |                          |                          |  |
| <input type="checkbox"/>      | <input type="checkbox"/> | RRSP Contributions  | <input type="checkbox"/> | <input type="checkbox"/> | Amount of Property Tax/Rent Paid in Year (include Landlord's Name and Address of Property) |
| <input type="checkbox"/>      | <input type="checkbox"/> | Tuition Receipts (T2202 Form)   |                          |                          | T2201 Slips (Disability Deductions, Self or Dependents)                                    |
| <input type="checkbox"/>      | <input type="checkbox"/> | Union, Professional Dues Receipts   | <input type="checkbox"/> | <input type="checkbox"/> | Charitable Donations and Political Contributions   |
| <input type="checkbox"/>      | <input type="checkbox"/> | Child Care Expenses (SIN, Name and Address of Caregiver)                  | <input type="checkbox"/> | <input type="checkbox"/> | Student Loan Interest Statement  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Moving Expenses   | <input type="checkbox"/> | <input type="checkbox"/> | Eligible Support Payments  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Medical Expenses (2020 Summary from Pharmacy)                             | <input type="checkbox"/> | <input type="checkbox"/> | Other Deductions (Carrying Charges, Interest)  |
| <input type="checkbox"/>      | <input type="checkbox"/> | T2200/T2200S/TL12 Forms (Employment Expenses - Include Statement of Exp.) | <input type="checkbox"/> | <input type="checkbox"/> |  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Home Office Expenses ( <a href="#">Complete Checklist</a> )               |                          |                          |  |
| <b>Other</b>                  |                          |   |                          |                          |  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Copy of 2019 Notice of (Re)Assessment                                     | <input type="checkbox"/> | <input type="checkbox"/> | Do you authorize CRA to prove information about you to Elections Canada? (Check for 'Yes') |
| <input type="checkbox"/>      | <input type="checkbox"/> | Income Tax Installments, Final Statement Indicating 2020 Total            | <input type="checkbox"/> | <input type="checkbox"/> | List of Foreign Property Owned if Cost > \$100,000 (T1135)                                 |
| <input type="checkbox"/>      | <input type="checkbox"/> | Details of Canada Savings Bonds Purchases/Cashed in and on Hand           | <input type="checkbox"/> | <input type="checkbox"/> | Are you a U.S. Green Card Holder? (Check for 'Yes')  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Direct Deposit my Refund (Enclose 'Void' Cheque for Account Info)         | <input type="checkbox"/> | <input type="checkbox"/> | Did you spend more than 120 days in the U.S. during 2020? (Check for 'Yes')                |
| <input type="checkbox"/>      | <input type="checkbox"/> | Details of any Residence Sold During the Year                             |                          |                          |  |
| <input type="checkbox"/>      | <input type="checkbox"/> | Have you received any private corporation dividends not exempt from TOSI? |                          |                          |  |