

Please Complete – Both New and Returning Clients
2020 Personal Tax Return Checklist - fillable

Name		Spouse's Name (if applicable)	
S.I.N.		Spouse's S.I.N.	
Date of Birth (DD-MM-YYYY)		Spouse's DOB (DD-MM-YYYY)	
Marital Status		Email Address	
Address			
Phone Number		Citizenship, if not Canadian	
Dependent's Name			
Dependent's S.I.N.			
Dependent's DOB			

Please check only those questions that apply to you, and then assemble the information noted in the right-hand column.

Questions	YES	NO	N/A	Information Required (if YES)
Are you a new client?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Previous Year's tax return <u>only if you are a new client.</u>
Do you wish your name, address and date of birth to be provided to Elections Canada?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Did you own a foreign property at any time in 2019 with a total cost of more than CAN\$100,000?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Please contact our office.
Did your marital status change in 2019	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide date of change
Have you sold a principal residence in 2019? Penalties apply if not reported!	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide details
New to Canada or Departed from Canada?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Date of Entry or Departure
Previous Year's Notice of Assessment(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	All assessments and reassessments
Employment Income, EI, CERB?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	T4s and T4As, T4E
Did you receive CPP or OAS Income?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	T4A (P) and T4A (OAS)
Investment Income?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	T3, T5 or T5013
Did you receive RRSP or RRIF Income? Homebuyer Plan withdrawals?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	T4RSP and T4RIF
Did you receive or pay any spousal support?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Details of all amounts of both child and spousal support paid and received.
Did you receive WSIB or social assistance payments?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	T5007
Did you receive any income, Canadian or foreign for which you did not receive an information slip?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Please provide details
RRSP Contributions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	RRSP Receipts

	YES	NO	N/A	
Did you sell any unregistered securities?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Statement of Gains and Losses (usually provided by investment firm)
Did you borrow money to invest?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Statement of interest paid
Did you pay accounting or investment counsel fees?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Statement of fees paid
Did you pay fees for collecting support or wage loss?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide details
Did you pay professional or union dues?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide details/receipts
Did you pay childcare expenses?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Specify name, address and SIN of recipient unless a business. Provide amounts paid.
If you are a teacher, did you incur expenses for eligible teaching supplies? Up to \$1,000 qualifies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide details/receipts
Are you or any dependant disabled?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide details
Did you spend \$100 or more on tuition? Did your child or spouse have unused tuition and education amounts?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	T2202 and details of child or spouse amounts if we are not filing their return.
Student Loan interest?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide statement
Medical expenses or attendant care expenses?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide details and a report from the insurer, pharmacy, dentist or receipts
Home Accessibility Tax Credit - Are you over 65, have a Disability Tax Credit OR support someone with a DTC and completed renovations to make your home safer or more accessible? (Up to \$10,000 qualifies)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide receipts
Does a member of your family require support due to a mental or physical infirmity?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide details
Charitable or Political donations in 2019?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide receipts
Property tax or rent paid?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide amount paid, address(es), landlord (if applicable) and number of months
Were any income tax instalments paid?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Provide statement
Did you move at least 40 km closer to your new employer? If student, did you move to attend school?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Details of moving costs
Did you own a rental property?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Details of rental income and expenses
Did you incur employment expenses? Working from Home? Qualify for flat rate \$2/day claim?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	T2200 and details of expenses or details of simplified method days
Were you self-employed as a proprietor?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Details of income and expenses? HST returns to be filed, if applicable
Are you a first-time homebuyer?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Details of purchase

Any other information: