

Canadian Personal Income Tax Return Checklist

Taxpayer Name:	Spouses Name:		
Date of Birth:	Date of Birth:		
Email:	Email:		
Phone:	Phone:		
Address:	Children	SIN	Date of Birth
Marital Status:			

<i>Please answer the following questions</i>	
Are you a Canadian citizen? If yes, can the CRA provide your name, address, and date of birth to Elections Canada?	Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/>
At any time during the year, did you own foreign property with a combined cost greater than \$100,000? (e.g. real property, securities, foreign bank account, etc.)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you wish to pension split if beneficial	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you sold or changed use of your principal residence? (home or vacation property during the year)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you a first-time homebuyer this year?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you signed and enclosed your Engagement Letter?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Which format would you prefer the client copy of your tax return printed in?	PDF (secured) <input type="checkbox"/> Paper <input type="checkbox"/>
Did you work from home as a result of the COVID-19 pandemic? <i>If Yes, please complete the additional "Work From Home 2020 Checklist"</i>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Did you receive any COVID-19 related payments from the government? <i>If Yes, please provide a copy of the related slip (eg: T4A) or provide explanation</i>	Yes <input type="checkbox"/> No <input type="checkbox"/>
For self-employed individuals: Did you receive the Canadian Emergency Business Account Loan (or any other government/grant business funding)? <i>If yes, please provide the loan or grant documentation</i>	Yes <input type="checkbox"/> No <input type="checkbox"/>

<i>Canadian and Foreign Sources of Income (provide slips, documents, or details)</i>	
Employment related income (T4, T4E) <input type="checkbox"/>	Capital gains <input type="checkbox"/>
Investment income (T3, T5) including backup attachments <input type="checkbox"/>	Provide proceeds, actual cost, commission fees, dates of acquisition and disposition of stocks/bonds/ mutual funds, real estate, personal property, jewelry, works of art, etc.)
Pension/retiring allowance/other (T4A) <input type="checkbox"/>	
CPP/QPP/OAS (T4A(P)/T4A(OAS)) <input type="checkbox"/>	Distributions from a foreign trust <input type="checkbox"/>
RRSP/DPSP/RPP/RRIF (T4RSP/T4RIF) <input type="checkbox"/>	Business/professional income/expenses <input type="checkbox"/>
Partnerships/tax shelters (T5013/T101) <input type="checkbox"/>	Auto expenses – including business/personal mileage <input type="checkbox"/>
Rental income/expenses <input type="checkbox"/>	Farming/fishing income/expenses <input type="checkbox"/>
If home offices expenses, please provide: business square feet: _____ & total square feet: _____	

