

Canadian Personal Income Tax Return Checklist

| | | | |
|-----------------|----------------|-----|---------------|
| Taxpayer Name: | Spouse's Name: | | |
| Date of Birth: | Date of Birth: | | |
| Email: | Email: | | |
| Phone: | Phone: | | |
| Address: | Children | SIN | Date of Birth |
| | | | |
| | | | |
| Marital Status: | | | |

Please answer the following questions

| | |
|---|--|
| Are you a Canadian citizen? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| If yes, can the CRA provide your name, address, and date of birth to Elections Canada? | 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.) <i>If yes, attach details.</i> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| At any time during the year, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? <i>If yes, attach details (see below).</i> | 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). <i>If yes, please provide sales documents.</i> | 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"/> |
| How would you like to receive your copy of the tax return? | 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 "2021 Work From Home 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"/> |

Canadian and Foreign Sources of Income (provide slips, documents, or details)

| | |
|---|---|
| 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"/> | Distributions from a foreign trust <input type="checkbox"/> |
| CPP/QPP/OAS (T4A(P)/T4A(OAS)) <input type="checkbox"/> | Business/professional income/expenses <input type="checkbox"/> |
| RRSP/DPSP/RPP/RRIF (T4RSP/T4RIF) <input type="checkbox"/> | Auto expenses – including business/personal mileage <input type="checkbox"/> |
| Partnerships/tax shelters (T5013/T101) <input type="checkbox"/> | Home office expenses: <input type="checkbox"/> |
| Rental income/expenses <input type="checkbox"/> | Square feet: Office space _____ Total home _____ |
| Farming/fishing income/expenses <input type="checkbox"/> | |
| Virtual Currency – provide details of how the investment is held (eg: exchange, online platform, wallet). Provide transaction details including buy/sell transactions, highest cost based during the year, gains/losses and other income earned. | |

| Deductions and Credits (provide slips, documents, or details) | | | |
|--|--------------------------|---|--------------------------|
| RRSP/pension contributions | <input type="checkbox"/> | Tuition fees/education expenses (include T2202A) | <input type="checkbox"/> |
| Union/professional dues | <input type="checkbox"/> | If transferring to parent, has child signed the T2202A ? | <input type="checkbox"/> |
| Childcare expenses | <input type="checkbox"/> | (include T11A for tuition paid to university outside of Canada) | |
| Moving expenses | <input type="checkbox"/> | Interest paid on student loans | <input type="checkbox"/> |
| Support payments made | <input type="checkbox"/> | Medical/attendant care expenses/travel medical insurance | <input type="checkbox"/> |
| Accounting/legal/investments counsel fees | <input type="checkbox"/> | If aged 65 or disabled: home accessibility expenses | <input type="checkbox"/> |
| Interest paid on investments | <input type="checkbox"/> | Income tax instalments/foreign taxes paid | <input type="checkbox"/> |
| Deductible employment expenses (include T2200) | <input type="checkbox"/> | Number of days spent in the US if greater than 120 in current or two previous years | <input type="checkbox"/> |
| Charitable donations | <input type="checkbox"/> | Prior year Notice of Assessment or Notice of Reassessment | <input type="checkbox"/> |
| Political/municipal contributions | <input type="checkbox"/> | Other | <input type="checkbox"/> |

| Please add Additional Information | | | |
|--|--|--|--|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |