



Chartered Professional Accountants

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**PLEASE COMPLETE THE FIRST PAGE AND SUBMIT IT TO OUR OFFICE WITH YOUR PERSONAL TAX INFORMATION:**

Client: \_\_\_\_\_ \_m / \_d / \_y \_\_\_\_\_  
 \*Address: \_\_\_\_\_ Names of spouse and dependents \_\_\_\_\_ Date of Birth \_\_\_\_\_ SIN \_\_\_\_\_  
 \_\_\_\_\_ \_m / \_d / \_y \_\_\_\_\_  
 \_\_\_\_\_ \_m / \_d / \_y \_\_\_\_\_  
 \*Phone Number: \_\_\_\_\_ \_m / \_d / \_y \_\_\_\_\_  
 \*Cell phone Number: \_\_\_\_\_ \_m / \_d / \_y \_\_\_\_\_  
 \*Work phone Number: \_\_\_\_\_ \_m / \_d / \_y \_\_\_\_\_  
 \*Email address: \_\_\_\_\_

\*Marital Status on Dec 31 (circle one): Single/Married/Common-Law/Separated/Divorced/Widowed  
 Date of change (if applicable): \_\_\_\_\_ (send agreement if applicable)

1. Are you registered and/or do you collect GST from customers? Yes \_\_\_ No \_\_\_ If yes, are we filing your GST Return? Yes \_\_\_ No \_\_\_ N/A \_\_\_
2. Did you sell your principal residence during 2020? Yes \_\_\_ No \_\_\_ If yes, what were proceeds, address and year acquired: \_\_\_\_\_ (Provide statement of adjustments if possible)
3. Are you a Canadian Citizen Yes \_\_\_ No \_\_\_ If yes, do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors? Yes \_\_\_ No \_\_\_ N/A \_\_\_
4. Did you own any **foreign property** with a cost of \$100,000 or more at any time in 2020? Yes \_\_\_ No \_\_\_ (Including cash, stocks, trust, partnerships, real estate, tangible and intangible property, etc.)
5. Has your direct deposit banking information changed in the last year? Yes \_\_\_ No \_\_\_ If yes, please inform our office.
6. Who was living in your household during 2020? \_\_\_\_\_ Who will claim NRD? \_\_\_\_\_ Basic \_\_\_\_\_ Additional \_\_\_\_\_
7. Disability tax credit: Are you or any of your dependents disabled? Yes \_\_\_ No \_\_\_
8. First time homebuyer's tax credit: Did you purchase your first home in 2020? Yes \_\_\_ No \_\_\_ If yes, please provide details.
9. Are you a volunteer firefighter or a search and rescue volunteer? Yes \_\_\_ No \_\_\_ If yes, provide a letter from the municipality.
10. Did you have any children in college/university during the year? Yes \_\_\_ No \_\_\_ Are you claiming any of the tuition? Yes \_\_\_ No \_\_\_ N/A \_\_\_ Are we preparing their tax return? Yes \_\_\_ No \_\_\_ N/A \_\_\_
11. If you were between the ages of 65-70 during the year and have self-employment earnings, do you wish to elect to stop contributing to the Canada Pension Plan (CPP)? Yes \_\_\_ No \_\_\_ N/A \_\_\_
12. Did you receive income or benefits under any COVID-19 relief programs? Yes \_\_\_ No \_\_\_ If yes, please inform our office.
13. Were you required to work at home for at least 4 weeks during the pandemic? Yes \_\_\_ No \_\_\_ If yes, please provide T2200S
14. What else do you think we need to know to prepare your tax return?  
 \_\_\_\_\_  
 \_\_\_\_\_

**PLEASE SEE OVER >**

**PLEASE USE THE FOLLOWING LIST TO ASSIST YOU IN COMPILING YOUR PERSONAL TAX INFORMATION:**

**Income (Include all information slips THAT APPLY TO YOU) NOTE: To avoid a failure to report income penalty, please submit any additional/late information slips as soon as possible.**

- T4 – Employment income
- T4A – Pensions, CERB and other income
- T4E – Employment insurance
- T4PS – Statement of Employee Profit Sharing Plan Allocations and payments
- T4 RSP – RRSP withdrawals
- T4 RIF – RIF payments
- T3 – Trust income (mailed as late as March 31)
- T5 – Interest and dividend income
- Other slips including T10, T2200, T2202, T101, TL11A, B, C and D, T5003, T5007, T5008, T5013, T5018
- Business income (statement of income and expense)
- Farm income (statement of income and expense)
  - Do you have an AgriInvest PIN? Yes  No  If yes, PIN: \_\_\_\_\_
- Rental property (statement of income and expense and any documents on capital purchases or sales)
- Capital gains & losses realized (including stock and mutual funds)
- Sale of capital property
- Alimony, separation allowances, child maintenance (including divorce/separation agreement)
- Interest income received and/or earned but not yet received

**Deductions (Please provide all receipts) THAT APPLY TO YOU**

- RRSP contributions (please indicate if repayment of LLP- lifelong learning plan or HBP-home buyers' plan)
- RRSP withdrawals for LLP- lifelong learning plan or HBP-home buyers' plan
- Employment expenses (T2200 filled out and signed by employer) **(Submit mileage log book for motor vehicle expenses, if applicable.)**
- Work-space-in-the-home details; T2200 from employer; square footage of workspace; period of time worked at home.
- Tuition receipts (T2202, TL11A, B, C or D)
- Interest paid on student loans
- Investment expenses (interest on money borrowed to purchase investments & investment counsel fees)
- Tradespeople /Apprentice Mechanics –list of **new** tools acquired, T2200 and list of receipts signed by employer
- Union or professional dues
- Charitable donations and/or political contributions
- Alimony, separation allowances or deductible child support payments paid during the year (copy of any new agreement)
- Childcare expenses (provide receipts with SIN of provider)
- Adoption related expenses
- Receipts to renovate your home to gain access/increase functionality if you are over 65 or eligible for the disability tax credit
- Receipts for teaching supplies used in a school/regulated child care facility by a certified teacher/early childhood educator
- Medical expenses for you or your dependents (prescription drugs, dental, private health care premiums, long term care and medical travel – worksheet provided)
- Moving expenses – if greater than 40 kms for new work or school location
- Travel in a Prescribed Zone – **box 32 on your T4 slip must have \$ amount**