



Your Numbers Guy

Personal Tax Return (T1) Checklist 2020



Our Personal Tax Return Checklist is designed to help you make this process as easy and efficient as possible. It also assists us in ensuring that we have information that is as complete and accurate as possible to ensure your taxes are minimized and correctly reported. Please review the checklist and put together the relevant slips and information. We are a digital practice and you can use wetransfer.com (free version) to send slips to us. (alternates email/drop off).

PERSONAL INFORMATION (If we prepared your 2019 return, please complete ONLY if there is a change)

Name	SIN	Birth Date (yyyy/mm/dd)	Home	Telephone Cell	Office
Taxpayer _____	_____	_____	_____	_____	_____
Spouse _____	_____	_____	_____	_____	_____
Address _____					
Email(s) _____					
Marital status: <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Common-law <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed					
If marital status changed during the year, provide date of change (YY-MM-DD): <input type="text"/> Nature of change _____					
Spouse's net income (if we are not preparing their return): <input type="text"/> (Best estimate if not completely available)					

RESIDENCE

Province or territory of residence on December 31

Are you a U. S. Citizen or a Green Card holder? Yes No

Did you immigrate to Canada or emigrate from Canada During the past ten years? Yes No

If in the past year, provide date of entry into Canada (YY/MM/DD): _____ or date of departure (YY/MM/DD): _____

ELECTIONS CANADA

Are you a Canadian Citizen and resident? Yes No

Do you wish to permit Elections Canada to utilize contact information to update the voters' list? Yes No

FOREIGN REPORTING

Do you own foreign assets outside your RRSP (other than personal use assets) with a cost greater than \$100,000? Yes No

Please provide details of ownership of foreign assets and transactions with foreign entities (PENALTIES APPLICABLE if not reported)

DEPENDANTS (unless unchanged, please provide)

Name	Birth Date (yyyy/mm/dd)	SIN	Relationship



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Did you dispose of your principal residence during the year? Please provide details of and/or documents for purchase and sale Yes No

Do you support a spouse or common-law partner, or a dependent with a **physical or mental impairment**? (dependents include grandparents, parents, brother, sister, aunts, uncles, nieces and nephews) Yes No

GENERAL INCOME/DEDUCTIONS

T4 slips - Employment income (including stock option benefits)? Yes No

T4A - Commission and self-employment (including directors fees, scholarships, bursaries)? Yes No

T4E - Employment insurance? Yes No

T5007 - Social Assistance or Workers' Compensation? Yes No

Income not included on T4 (tips, gratuities and occasional earnings etc)? \$

Professional or Union dues paid? (not included on T4) \$

Child care expenses? Please provide receipts for each child Yes No

Support payments made or received? (spousal support and/or child support) Yes No

Moving expenses? Please provide details with all receipts Yes No

PENSION INCOME

T4A - Pension, retirement and annuity income? Yes No

T4AP - Canada pension? Yes No

T4A(OAS) - Old age security? Yes No

T4A(RCA) - Retirement compensation arrangements? Yes No

T4RSP - Registered retirement savings plan income (including withdrawals)? Yes No

T4RIF - Registered retirement income fund income? Yes No

RRSP - **Home buyers** plan or **Life Long learning** plan withdrawals or repayment? provide details Yes No

Foreign pension income? Attach details of amounts received. Yes No

INVESTMENT INCOME/DEDUCTIONS

T3 - Income from trust allocations? Yes No

T5 - Investment Income (dividends, interest, including interest earned but not yet received, for example, Canada Savings Bonds)? Yes No

T4PS - Income from profit sharing plans? Yes No

T5013/T5013A - Partnership income? Yes No

T5008 - Income from Securities transactions? Yes No

Other investment income, for example labour sponsored funds? Yes No

Shares acquired and/or disposed of through exercise of stock options? Please provide details. Yes No

Did you dispose of property during the year (publicly traded shares, bonds, real estate, etc.)? Yes No

If yes, please provide the following information as a separate document:

Description of property	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Disposal expenses
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Interest costs on funds borrowed to earn investment income \$ Investment Management Fees \$ Accounting/legal fees \$



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SELF-EMPLOYMENT/BUSINESS/PROFESSIONAL/RENTAL INCOME

- | | | |
|--|------------------------------|-----------------------------|
| Financial statements or summary details for business/rental investments attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Details of income and expense items attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Details (including dates) of acquisition and disposals of fixed assets attached? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you use your vehicle for business? Provide expenses, both business and total kilometers | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you use a portion of your home for business?
Provide expenses; both workspace and total square footage of home and space used for business | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Government business account number, if applicable? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Have you registered to be eligible for Employment Insurance special benefits? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

RRSP CONTRIBUTIONS AND OTHER CREDITS

- | | | |
|--|------------------------------|-----------------------------|
| Did you make any RRSP contributions? Attach receipts (including those in the First 60 days of 2020) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Employment expenses (Form T2200 signed by employer), including tools? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Medical expenses (including travel insurance, Gluten-free products, Medical Marijuana and cannabis products for medical purposes etc.)? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Tuition fees for yourself? (Form T2202) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Tuition fees for your dependent? (Form T2202 signed by student) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Did you pay interest on student loans? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Did you pay for any trade or professional examination or other professional dues? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Did you complete a minimum of 200 hours of volunteer fire-fighting services in the year, which includes responding to calls, being on call, attending meetings and training related to prevention and suppression of fire? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Details of and Form T2201 (you or dependents for prolonged mental & physical impairment or life-sustaining therapy)(Vision, memory, speech, Type 1 Diabetes, Kidney Disease etc.) ? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Charitable donations? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Political contributions? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Are you eligible for the Home Buyer's Amount? (You or your spouse have neither owned or lived in a home in the year of purchase or in the four preceding years) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Home Accessibility Tax Credit (HATC)? BC Home Renovation Tax Credit? (Seniors or disabled) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Did you incur any adoption related expenses? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Pension Adjustment Reversals (T1O slip)? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Mining tax credit expenses or Film and Video production eligible for tax credit? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Eligible educator school supply tax credit? Claim up to \$1,000 for eligible teaching supplies | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Amounts paid for children's physical activity under 16 (18 if disabled)? (Manitoba or Yukon only) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Amounts paid for children's artistic or cultural (music, dance) activity under 16 (18 if disabled)? (Manitoba or Yukon only) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

PRIOR YEAR TAX RETURN INFORMATION/CORRESPONDENCE

- | | | |
|---|------------------------------|-----------------------------|
| Notice of (RE)Assessment for 2018 year including RRSP contribution limit ? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Notice of (RE)Assessment(s) for any other year if not already provided to us? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2019 Income tax instalments paid for the year? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Direct Deposit - is your information current? If changed, provide a VOID cheque | <input type="checkbox"/> Yes | <input type="checkbox"/> No |



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ADDITIONAL INFORMATION (if required)

PERSONAL PREFERENCES

Format desired for the final copy of your personal income tax return(s)

Paper (extra \$) PDF (email)

If paper copy requested, indicate if you would like spouses returns and family members packaged separately.

Separately Together



Your Numbers Guy

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