

Personal Tax Return (T1) Checklist

Our Personal Tax Return Checklist is designed to help make the process of providing us information as easy and efficient as possible. It assists us in ensuring we have information that is as complete and accurate so your tax payable is 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 the free version of wetransfer.com to send slips/documents to us using my email dave@yournumbersguy.ca! If we are authorized on the CRA as your representative income slips can usually be retrieved digitally by our tax software.

Did we do your taxes last year? Yes No

Did your address, marital status or dependants change? Yes No

New clients fill in all relevant areas

PERSONAL INFORMATION (if we prepared a prior return, complete ONLY if there was a change)

Name	SIN	Birth Date (yyyy/mm/dd)	Home Phone	Cell Phone
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Taxpayer _____

Spouse _____

Full Address _____

Email(s) _____

Marital status: Married Single Common-law Separated Divorced Widowed

RESIDENCE

Province or Territory of residence on Dec 31

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

Did you immigrate to Canada or emigrate from Canada during the past ten Years? Yes No

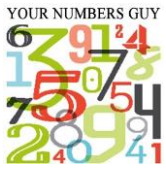
If in the past year, provide date of entry into Canada (yy/mm/dd): _____ or date of departure (yy/mm/dd): _____

FOREIGN REPORTING

Do you own any foreign assets outside our RRSP with a greater cost than \$100,000? Yes No

DEPENDENTS (unless unchanged)

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



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Did you dispose of your principal residence during the year? Yes No
If yes provide details of sale.

Do you support a spouse or common-law partner, or a dependent with a physical or a mental impairment? (Grandparent, parents, brother, sister, aunt, uncle, nieces & nephews.) Yes No

GENERAL INCOME/DEDUCTIONS

T4 Slips – Employment Income (including stock option benefits)? Yes No

T4A – Commission & Self Employment (including director 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 a T4) \$

Child care expenses? Please provide receipts and SIN# of Caregiver if an individual Yes No

Support payments made or received? (spousal support provide name/SIN) Yes No

Name _____ S.I.N. _____ \$ _____

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

SELF-EMPLOYMENT/BUSINESS/PROFESSIONAL/RENTAL INCOME

Financial statements or summary details for business/rental investments attached? Yes No

Details of income and expense items attached? Yes No

Details (including dates) of acquisition and disposals of fixed assets attached? Yes No

Do you use your vehicle for business? Provide expenses, both business and total kilometers. Yes No

Do you use a portion of your home for business? Yes No

Provide expenses; both workspace and total square footage of home and space used for business Government business account number, if applicable)? Yes No

Have you registered to be eligible for Employment Insurance special benefits)? Yes No



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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? 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 or Legal Fees	\$ _____
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RRSP CONTRIBUTIONS & OTHER CREDITS

Did you make any RRSP contributions? Attach receipts (including those in the First 60 days of 2020) Employment expenses (Form T2200 signed by employer), including tools.? Yes No

Medical expenses (including travel insurance, Gluten-free products, Medical Marijuana and cannabis products for medical purposes etc.)? Yes No

Tuition fees for yourself? (Form T2202) Yes No

Tuition fees for your dependent? (Form T2202 signed by student) Did you pay interest on student loans? Yes No

Did you pay for any trade or professional examination or other professional dues? Yes 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? Yes 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.) ? Yes No

Charitable donations? Political contributions? Yes No

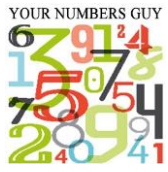
Are you eligible for the Home Buyer's Amount? (You or your spouse have neither owned or lived in a home in the year of purchase or in the four preceding years) Yes No

Home Accessibility Tax Credit (HATC)? BC Home Renovation Tax Credit? (Seniors or disabled) Yes No

Did you incur any adoption related expenses? Pension Adjustment Reversals (T1O slip)? Yes No

Mining tax credit expenses or Film and Video production eligible for tax credit? Yes No

Eligible educator school supply tax credit? Claim up to \$1,000 for eligible teaching supplies Yes No



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PRIOR YEAR INFORMATION

Notice of (RE)Assessment for PRIOR year including RRSP contribution limit?

Yes

No

PRIOR YEAR Income tax instalments paid for the year?

Yes

No

Direct Deposit - is your information current? If changed, provide a VOID cheque

Yes

No

ADDITIONAL INFORMATION

Type any additional information here for anything that we should know or to further explain anything above.

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