

## 20\_\_ Tax Information Checklist

### Contact information (indicate any updates)

### Family information

Has your marital status changed?  Yes  No

Are there any changes to your  Yes  No

dependents?

(provide SIN, name and birth date)

### Questions required for electronic filing

Are you a Canadian Citizen?  Yes  No

Do you agree to Canada Revenue Agency providing your name, address, and date of birth to Elections Canada for the National Register of Electors?

### Principal residence reporting

Complete address of the home sold (including postal code): \_\_\_\_\_ Year purchased \_\_\_\_\_  
Sale price \_\_\_\_\_

### Supporting documents

Notice(s) of (re)assessment for 2020

#### Slips

- T4 Slip (Employment Income)
- T4E for employment insurance payments
- T3, T5, T5008 (Interest, dividends, mutual Funds)
- T2202 Tuition fees
- RC62 (Universal Child Benefit)
- T4A-OAS, T4AP (Old Age Security & CPP Benefits)
- T4A (Other pensions and annuities)
- T5007 (Social assistance payments)
- T5007 (Workers compensation benefits)
- T2200 Employment expenses
- All other information slips
- Due to COVID-19- work from home**
  - Total number of days you worked from home \_\_\_\_\_
  - Total number of hours you worked from home \_\_\_\_\_
- Digital News Subscription Tax Credit
  - Provide details of your subscription(s)

### Other/new income sources

- First year for CPP, OAS?
- Alimony and/or maintenance received
- Rental property revenue and expenses
- Business, self-employed income, and expenses

### Receipts

- RRSP contributions and withdrawal
- Union or professional dues
- Donations
- Medical expenses, including plan premiums
- Childcare
- Student loan interest
- Moving expenses
- Transit pass
- Investment expenses (interest, mgmt. fees)
- Exams for professional certification
- Office – In – Home expenses
- Rent Receipt
- Alimony and/or maintenance paid

Please return supporting documents and completed form to our office.

## 2020 T1 Foreign Property Reporting

Canadian resident individuals who held certain property outside Canada with a total cost of more than \$100,000 CAD at any time during the tax year are subject to certain disclosure requirement to the Canada Revenue Agency (CRA).

Non-compliance with this reporting requirement results in severe penalties. To help us determine whether you are subject to the reporting rule, please read and consider each of the following questions carefully when answering them.

If you owned any of the following property at any time during 2020, answer YES to the relevant questions. You may be subject to the foreign property reporting rule, and we may prepare additional forms to submit to the CRA.

1. Funds or intangible property (patents, copyrights, etc.) situated, deposited or held outside Canada  Yes  No
2. Tangible property situated outside of Canada  Yes  No
3. A share of the capital stock of a non-resident corporation held by the taxpayer or by an agent on behalf of the taxpayer  Yes  No
4. An interest in a non-resident trust that was acquired for consideration, other than an interest in a non-resident trust that is a foreign affiliate for the purposes of section 233.4  Yes  No
5. An interest in a partnership that holds a Specified Foreign Property unless the partnership is required to file a T1135  Yes  No
6. An interest in, or right with respect to, an entity that is a non-resident  Yes  No
7. A property that is convertible into, exchangeable for, or confers a right to acquire a property that is Specified Foreign Property  Yes  No
8. A debt owed by a non-resident, including government and corporate bonds, debentures, mortgages, and notes receivable  Yes  No
9. An interest in a foreign insurance policy  Yes  No
10. Precious metals, gold certificates, and futures contracts held outside Canada  Yes  No
11. Information return relating to controlled and non-controlled foreign affiliates required to file T1134  Yes  No
12. Do you own shares in a foreign corporation?  Yes  No
  - If yes what is the percentage of your shares \_\_\_\_\_
  - What is the total cost of total shares \_\_\_\_\_?
  - If more than \$100,000 or total gross receipts are more than \$25,000 please provide information

Signature: \_\_\_\_\_

Date: \_\_\_\_\_