

2020 T1 Personal Tax Return Checklist

We are pleased to prepare your tax return and hope this is just the beginning of a successful relationship for us.

We obtain CRA access for all clients to be able to access their CRA data online, and safely contact CRA if there are any questions or concerns about your tax file. You can use CRA My Account or call CRA at any time to remove this access. To authorize us online, enter 838992113 as the business number, level 2 access, all years.

Please complete this checklist and include it with your slips and receipts when you drop them off either at the office or in the mailbox outside our door. Or scan us and send using this link: www.paulvet.ca/upload-files

Please provide the following documents:

- Latest Notice of Assessment from CRA
- Last year's tax return OR a copy of the last return you filed

How do you want your tax return delivered once its complete? Choose one please

- Email your return, then use DocuSign and your phone device to digitally sign it.
- Hold for pick- or or meet in person to review and sign
- Other (please specify): _____

If you need to clarify any of your income and/or deductions OR have any other income and/or deductions that are not listed on the previous page that you need to explain, please write them in the box below or another page. Please attach supporting receipts. Or give us a call to discuss further.

2020 Data**Your Information**

Name: _____
SIN Number: _____
Date of Birth: ____/____/____ (MM/DD/YY)
Cell/home Phone #: _____
E-mail: _____
Address: _____
City: _____ Prov: _____
Postal Code: _____ Country: _____

Did you emigrate from Canada in 2020 ____ Y/N
Emigration date: ____/____/____ (MM/DD)
Did you immigrate from Canada in 2020 ____ Y/N
Immigration date: ____/____/____ (MM/DD)
Are you a Canadian citizen?: ____ Y/N
Do you authorize the CRA to provide information about you to Elections Canada? ____ Y/N
Do you own/hold foreign property with a total cost of more than \$100,000 (CAD)? ____ Y/N
How do you want to receive your CRA notice of assessment? Check one:online ____ or mail ____

Your Spouse (if applicable)

Name of Spouse: _____
SIN Number: _____
Date of Birth: ____/____/____ (MM/DD/YY)
Cell/home Phone #: _____
E-mail: _____
Address: _____
City: _____ Prov: _____
Postal Code: _____ Country: _____

Did you emigrate from Canada in 2020 ____ Y/N
Emigration date: ____/____/____ (MM/DD)
Did you immigrate from Canada in 2020 ____ Y/N
Immigration date: ____/____/____ (MM/DD)
Are you a Canadian citizen?: ____ Y/N
Do you authorize the CRA to provide information about you to Elections Canada? ____ Y/N
Do you own/hold foreign property with a total cost of more than \$100,000 (CAD)? ____ Y/N
How do you want to receive your CRA notice of assessment? Check one:online ____ or mail ____

Marital Status: _____ Choose one Single Married Separate Divorced Widowed
Did your marital status change in 2020 ? ____ Y/N Date status changed: ____/____/____ MM DD YY

Are we preparing a tax return for your spouse? Yes No N/A

If we are not preparing your spouse's tax return, please provide their net Income Line 23600 \$ _____

Dependents- Please list all below:

First & Last Name	Relationship	Birthday (mm/dd/yy)	SIN #	Net income

Do you, your spouse or any of your dependents qualify for the Disability Tax Credit? ____ Yes / No

If yes, please indicate who: _____

Did you pay rent or property tax during the year? _____ Y/N

Provide the address and landlord's name _____

Attach receipts for the rent amount paid.

Income Sources		
Check all applicable income sources and provide the tax slip or data noted:		
	T4	Employment income
	T4A	Pensions, retiring allowance, fees, scholarships, CERB income
	T4AP	Canada Pension Plan
	T4(OAS)	Old Age Security
	T4E	Employment insurance benefits
	T4PS	Profit sharing income
	T4RSP	RRSP income or withdrawal
	T4RIF	RRIF income
	T3 / T5	Dividend income
	T3 / T5	Interest income
	T5013	Limited partnership income
	T5007	Social assistance or Worker's compensation benefits
	T5008	Capital gains/securities transactions
	T2125	Self-employment income and expenses, see checklist on PV website
	T776	Rental Property income and expenses, see checklist on PV website
		Spousal support received \$ _____
		Child support \$ _____
		Tips & gratuities \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____

Deductions and Tax Credits		
Check all applicable deductions or credits and provide receipts or supporting documents:		
		Charitable donations
		Medical expenses
		RRSP contributions self / spousal
		Union dues & professional fees
		Childcare expenses
		Accounting fees
		Interest paid on investment loans
		Investment counsel or mgmt fees
		CRA instalment payments
	T777	Employment expenses – may require signed T2200 or T2200S by employer, see checklist on PV website
	T2202	Tuition fees – self / spouse / children (sign back for transfers)
		Interest paid on student loans
		Political party contributions – Federal or Provincial
		First-time home buyer's amount
		Home Buyer's Plan withdrawals/payments
		Lifelong Learning Plan withdrawals/payments
		Spousal support paid \$ _____
		Moving expenses
	T1223	Clergy residence deduction
		Apprenticeship expenses
		Adoption related expenses
		Supplies paid by educators
		Other: _____ \$ _____
		Other: _____ \$ _____
		Other: _____ \$ _____