

2020 T1 Free Personal Tax Return Checklist

Paul Vet, CA. Professional Corporation will prepare your return free of charge under a “best efforts” basis in the following situations:

Simple Tax Situations are generally income from these sources:

Employment, pension, benefits such as the CPP, disability insurance, employment insurance, and social assistance, registered retirement savings plans (RRSPs), support payments, scholarships or grants, interest (under \$1,000)

Your tax situation is not simple if you have any of the following: self-employed, employment expenses, business or rental income and expenses; capital gains or losses; or filed for bankruptcy, returns for deceased persons.

Combined family income under the following amounts:

1 person	\$35,000	2 persons	\$45,000
3 persons	\$47,500	4 persons	\$50,000
5 persons	\$52,500	More than 4 persons	\$55,000

Please complete this checklist and include it with your slips and receipts when you drop them off. Or scan and send it to me at this link: www.paulvet.ca/upload-files

You'll need to complete, sign and return a form to authorize Paul Vet to retrieve your CRA Online data and sign a limited engagement letter (see last page)

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?

- Emailed - you will review and approve using DocuSign
- Hold for pick-up
- 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.

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: 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 whom: _____

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.

_____ your name

_____ your address

Your tax return has been prepared free of charge. This is a community service offered by the firm of Paul Vet, CA, Professional Corporation (PVCAPC). No fees have been charged for the preparation or electronic filing of this return with the Canada Revenue Agency. These services have been provided on a “best efforts” basis.

By signing this letter, you represent that you have provided us with accurate and complete information necessary to prepare your tax return. You confirm that

- all worldwide sources of income have been disclosed whether or not they are reported on a "T" slip;
- all investment income has been disclosed, whether or not they are reported on a "T" slip;
- all dispositions of a capital nature, and their costs, have been reported;
- You did not, at any time in the year, hold an interest in foreign property with a cost over \$100,000.
- You are not aware of any possibly illegal acts for which you have not disclosed all related facts.

The law imposes various penalties when taxpayers understate their tax liability. Your return will include the following statement “Prepared without audit or review from information provided by the taxpayer” along with the firm name identified as the preparer.

You agree to hold harmless the firm (PVCAPC) from any errors, omissions, inaccuracies, negligent misrepresentations or torts that may result from the preparation and filing of this return.

If this letter accurately reflects your understanding, please acknowledge your agreement by signing and returning it to me. Please feel free to call or email me with any questions or concerns.

Sincerely,

Paul Vet, CPA, CA

I acknowledge and accept these responsibilities and agree to the terms outlined above

Signed and dated, must be returned