 See *New 2020 Personal Tax Return Checklist 	For Office Use Only:
	Date Received:
Name	Preparer:
Social Insurance #	
Phone Number (h)(c)	
Address (if changed)	
Date of Birth:	
Email:Do you regul	larly check this e-mail? 🛛 Yes 🖵 No
*Can we provide you with electronic copies this year instead of paper (We use encryption software for safe transfer)	? 🗆 Yes 📮 No
*Please list persons authorized to pick up your return (if not you	ג):
Family information	on:
Marital Status: <u>Single</u> Common Law Married Se	eparated <u>Divorced</u> Widowed
Did your marital status change in 2020?	the date:
Spouse/Partner Name SII	N: DOB:
Are we filing a return for your spouse? Yes No Check if your spo	ouse had no income for 2020 🗖
Do you have an eligible equivalent to spouse? Yes No	
Name and birth date of child born in 2020	
Dependant name(s) and SIN(s) if applicable (< 19 years old):	
Are all persons described above Canadian citizens? Yes No If no	
Do all filing persons wish to register with Elections Canada for 2020?	
Did you have foreign property in excess of \$100,000 in 2020? Yes	J No
Do you drive a company vehicle? Yes No	
Do you own any companies? Yes No If yes, please provide the na	
2020 Income – Please provide	the following:
Employment income - please include:	
T4 slips for all sources of employment	
List of expenses associated with employment. Note: Your employe	er needs to complete a T2200 for you to be eligible.
COVID 19 - Work-from-home expenses to claim due to the panden	nic. Requires T2200 from employer. (<mark>*New</mark>)
Self-employed fisher / sole proprietor income - please include:	
□ List of all income □ List of all business expenses □ Annual dues	
Use of vehicle for 2020: # of personal kms # of business k	ms Type of vehicle
Did you purchase a zero-emission vehicle in 2020?	
Fishing settlements bait, fuel expenses and administrative fees, etc.	<u>.</u>
□ CEWS – 75% Wage subsidy. Total received \$	_ (<mark>*New</mark>)
Fisher Grant – Total received \$ (*New)	
Investment income – please include:	
Income slips (T5s and T3s) for all investments and interest-bearing until end of March)	bank accounts (Note: T3 slips may not be received
T3 slips for any monies received from a Family Trust	
Did you sell shares in 2020? If so, please enclose a gain/loss report.	
Do you have eligible (qualified Canadian journalism) digital media s	subscription fees to deduct? <mark>(*New)</mark>
□ Management fees paid on investment portfolios \$]

Do you hold investment loans? If so, what interest did you pay for 2020? _____

Did you sell any property in 2020? (i.e. Cottage, land, **principal residence**, etc.)

Other income – please include:

🖵 Canada Pension Plan - T4A (P)	Old Age Security - T4A (OAS)	Registered Retirement Plans - T4RIF

□ RRSP withdrawals - T4RSP □ Unemployment payments - T4E □ Commission income – T4A

□ Scholarships or bursaries – T4A □ Workers' Compensation – T5007 □ Social Assistance – T5007

□ Spousal support \$_____ □ Universal Child Care payment- RC 62 □ CERB – T4A or T4E (*New)

□ Rental income - Please enclose report of income and expenses and details of property sales and purchases

lacksquare Do you wish to split pension income with a spouse? lacksquare Yes lacksquare No

<u>Credits – please include:</u>

□ Medical expenses including prescriptions, prescribed medical supplies, dental, VON care, blood collection fees (<u>Your</u> <u>pharmacy can print you out a complete list of prescriptions for 2020</u>, which is preferable to the individual receipts. If you do not obtain an annual receipt, please add slips and list totals for each taxpayer. Please note: Massage therapy is not eligible as a medical expense in the province of Nova Scotia.

□ Health insurance or Nova Scotia Pharmacare fees

Did you travel for medical purposes in 2020? If so, please indicate dates, # of kms travelled and whether you were medically required to have a driver. You also require a letter of proof for the appointments.

Are you or any member of your family disabled? Who:_

□ Are you a caregiver? If so, please indicate name and SIN of the individual and their net income for 2020:

□ Tuition slips – if slips are for children, will they be transferring the credit to their parent's return? □ Yes □ No (Please submit tuition slips already signed by the student on the back). Please note: the 2020 budget has extended eligible tuition credits to include occupational skills courses taken at post-secondary institutions.

Canada Training Credit – courses for occupational, professional or trade examinations (Please include receipts) *New

Student loan interest

Are you a teacher? If so, you need a signed statement from the employer that verifies purchase of eligible teaching supply receipts up to \$1,000 to claim the \$150 tax credit.

□ Did you renovate components of your house for accessibility purposes? If so, you could be eligible for up to a \$10,000 tax credit. (Note: You have to be eligible for the disability credit OR 65 and older to claim this credit – please enclose details and supporting invoices)

RRSP contributions Total of 2020 \$_

___ Home Buyer's Plan? 🗖 Yes 📮 No

Child care expenses – please enclose receipts with business number or social insurance number and name of provider

Donations

□ First-time home buyer in 2020?

□ Public transit passes? Please include receipts.

□ Volunteer firefighter / search & rescue? Do you have at least 200 hours of volunteer service in 2020? □ Yes □ No *You must have an official letter from the chief or delegate with full contact information and signature.

Moving expenses: Date of move _____ Reason ____

□ Tax Installments paid \$____

Other Notes to Preparers: