

• **See *New** 2020 Personal Tax Return Checklist

For Office Use Only:

Date Received: _____

Preparer: _____

Reviewer: _____

2020 T1 Bill (before HST): _____

Ref/Owe: _____

Name _____

Social Insurance # _____

Phone Number (h) _____ (c) _____

Address (if changed) _____

Date of Birth: _____

Email: _____ Do you regularly check this e-mail? Yes No

*Can we provide you with electronic copies this year instead of paper? Yes No
(We use encryption software for safe transfer)

*Please list persons authorized to pick up your return (if not you): _____

Family information:

Marital Status: Single Common Law Married Separated Divorced Widowed

Did your marital status change in 2020? Yes No If so, what was the date: _____

Spouse/Partner Name _____ SIN: _____ DOB: _____

Are we filing a return for your spouse? Yes No Check if your spouse 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, please specify _____

Do all filing persons wish to register with Elections Canada for 2020? Yes No

Did you have foreign property in excess of \$100,000 in 2020? Yes No

Do you drive a company vehicle? Yes No

Do you own any companies? Yes No If yes, please provide the names _____

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 employer needs to complete a T2200 for you to be eligible.

COVID 19 - Work-from-home expenses to claim due to the pandemic. Requires T2200 from employer. (*New)

Self-employed fisher / sole proprietor income - please include:

List of all income List of all business expenses Annual dues or professional memberships

Use of vehicle for 2020: # of personal kms _____ # of business kms _____ Type of vehicle _____

Did you purchase a zero-emission vehicle in 2020? _____

Fishing settlements bait, fuel expenses and administrative fees, etc.

CEWS – 75% Wage subsidy. Total received \$ _____ (*New)

Fisher Grant – Total received \$ _____ (*New)

Investment income – please include:

Income slips (T5s and T3s) for all investments and interest-bearing bank accounts (Note: T3 slips may not be received until end of March)

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 subscription fees to deduct? (*New) Max = \$500

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.)

