

PERSONAL INCOME TAX CHECKLIST - 2020

| INCOME | DOCUMENTATION REQUIRED | # OF ITEMS | N/A |
|--|------------------------------------|-------------------|------------|
| 1. Salaries, wages commissions, fees, allowances | T4, T4A | | |
| 2. Pensions | T4A, T4AP, T4A(OAS), T4(RIF) | | |
| 3. EI Benefits | T4E | | |
| 4. Investments: Interest, Dividends, Foreign Income | T5, T4PS, T600, T3, T5008, T5013 | | |
| 5. Capital Gains & Losses (Year End Reports) | Buy-Sell slips, T3, T4PS, T5 | | |
| 6. Rental Income | T5013/Income & Expenses | | |
| 7. Alimony, child support or separation allowances | Amount | | |
| 8. Registered Retirement Savings Plan Income | T4RSP | | |
| 9. Other income (retiring allowances, scholarships etc.) | T4A, Listing of Income | | |
| 10. Income and Expenses from Self Employment | Listing or Financial Stmts., T5018 | | |
| 11. Universal Child Care Benefit | RC62 | | |

| DEDUCTIONS & CREDITS | DOCUMENTATION REQUIRED | # OF ITEMS | N/A |
|---|---------------------------------------|-------------------|------------|
| 11. Allowable employment expenses (auto, travel etc.) | T2200, T2200S, Receipts | | |
| 12. R.R.S.P. contributions | Official Receipts | | |
| 13. Did you purchase a home using R.R.S.P. funds? | Revenue Canada Statement | | |
| 14. Union, professional dues | Official Receipts | | |
| 15. Tuition Fees | Official Receipts T2202A, TL11 | | |
| 16. Child Care Expenses-name, address, SIN of payee | Receipts | | |
| 17. Investment carrying charges, loan interest for investments, safe custody fees | Receipts | | |
| Accounting Fees, investment counsel fees. | Receipts | | |
| 18. Moving Expenses (job related move) | T1M/Receipts | | |
| 19. Alimony, child support paid | Amount/SIN & Name and address | | |
| 20. Tax Shelter investments | T101, T102, T5013 | | |
| 21. Medical Expenses-for any 12 month period | Receipts | | |
| 22. Charitable Donations/Political Contributions | Receipts | | |
| 23. Other Deductions | Complete Details | | |
| 24. Tuition fees deducted Student or supporting parent | T2202, T2202A Tuition Receipt | | |
| 25. Ontario Property Tax Credit (Rent Paid & Taxes Pd) | Name of landlord, Municipality Amount | | |
| 26. Income Taxes paid in Instalments | Receipts | | |
| 27. Special Tax credits | Adoption Expenses, T2038(IND) | | |
| 28. Student Loan Interest | Receipts | | |
| 29. Adoption Expenses | Receipts | | |
| 30. Payments for IVF Treatments | Receipts | | |

- | | | |
|--|-----|----|
| 1. Did any of your dependants earn income during the year? (Ignore if we are preparing a return for those dependants) | YES | NO |
| 2. Did you support any other dependants during the year? (If non-resident, only spouse and children may be claimed) | YES | NO |
| 3. Were you or a dependant disabled during the year? (Impairment must have lasted or be expected to last for more than 1 year) Complete Form T2201 and provide caregiver receipts. | YES | NO |
| 4. If you began to pay child support or renegotiated your child support payments in the tax year, please provide a copy of the agreement. | YES | NO |
| 5. Did your child (children) begin College or University in the tax year? | YES | NO |
| a) Did he or she live off residence, besides there home? if yes, please provide a receipt that details, landlord, address and amount | YES | NO |
| 6. If you receive a refund, do you want Direct Deposit? If yes, provide branch #, account # and institution # or Void cheque. | YES | NO |
| 7. Do want to authorize Canada Customs & Revenue Agency to provide Elections Canada with your name, address and birth date to allow Elections Canada to update the National Register of Elections. | YES | NO |
| 8. Did you work from home as a result of COVID-19? | YES | NO |