

Personal Tax Checklist for 2021

THE BASICS – INFORMATION USED TO IDENTIFY YOUR TAX FILINGS

Our address information is unchanged from our filing last year

Name and Address (If changed)

Last Name	First Name	Middle Name
Date of Birth	SIN	
Home Phone	Mobile	
Email Address		
Spouse Last Name	Spouse First Name	Spouse Middle Name
Date of Birth	SIN	
Home Phone	Mobile	
Email Address		
Address Line 1		
Address Line 2		
City	Province	Postal Code

Marital and Other Canadian Obligations

On December 31, 2021 your marital status was:

Single Common-law Married Divorced Separated Widowed

Did your marital status change in 2021? Yes No **If yes, what was the date of change:**

Please circle the correct answer for each of the following questions, which are required in preparing your tax return:

	You		Spouse	
• I have read, signed and returned a copy of the 2021 personal tax engagement letter (We cannot release your return to the government without this form in our possession)	Yes	No	Yes	No
• I am eligible for the disability amount and have a T2201 on file	Yes	No	Yes	No
• I disposed of a principal residence during the year (See page 4).....	Yes	No	Yes	No
• I authorize the registration for the CRA online notification, rather than mail	Yes	No	Yes	No
• I am a Canadian resident on December 31, 2021	Yes	No	Yes	No
• I am a US Citizen or a green card holder	Yes	No	Yes	No
• I am a Canadian citizen	Yes	No	Yes	No
• I authorize the CRA to release my name, address and date of birth to Elections Canada for the purpose of updating the National Register of Electors	Yes	No	Yes	No
• I have owned foreign property during 2021 with a total cost of more than Canadian \$100,000. (Refer to the engagement letter for more information and complete Appendix F if applicable).....	Yes	No	Yes	No
• I have a tax-free savings account	Yes	No	Yes	No

THE BASICS – INFORMATION USED TO IDENTIFY YOUR TAX FILINGS

Children or dependents

Last Name	First Name	Middle Name
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Date of Birth	SIN
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Email Address	Relationship
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Address, if different from above

Last Name	First Name	Middle Name
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Date of Birth	SIN
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Email Address	Relationship
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Address, if different from above

Last Name	First Name	Middle Name
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Date of Birth	SIN
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Email Address	Relationship
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Address, if different from above

Last Name	First Name	Middle Name
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Date of Birth	SIN
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Email Address	Relationship
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Address, if different from above

In this section we want to learn about the slips that will be used to prepare typical data for your tax return. These first questions are asking what type of slip we should expect in the package you are delivering.

TAXATION SLIPS – ITEMS TO INCLUDE IN YOUR PACKAGE			
T4 Slips		Do you have these?	
		You	Spouse
T4	Salary, wages and benefits		
T4A	Pension, retirement and other income		
T4A (P)	Canada Pension Plan benefits		
T4A (OAS)	Old Age Security		
T4E	Employment insurance, CRB and other benefits		
T4RIF	Income from registered retirement income funds		
T4RSP	Income from registered retirement savings plans		
T5 Slips		Do you have these?	
		You	Spouse
T5	Statements of Investment income		
T5007	Statements of benefits		
T5008	Securities transactions		
T5013	Partnership income		
T3 Slips		Do you have these?	
		You	Spouse
T3	Trust income and distributions		
Miscellaneous Government Slips		Do you have these?	
		You	Spouse
RC210	Working Income Tax Benefit		
T101	Statement of resource benefit		
T2202A	Tuition and textbook amounts certificate		
Other	Did we forget something?		

INCOME WITH NO SLIPS – PLEASE INCLUDE SUPPORTING DOCUMENTS

Other Income	Amount	
	You	Spouse
Gratuities and tips	\$	\$
Casual earnings	\$	\$
Spousal support	\$	\$
Other: Did we forget something?	\$	\$

CAPITAL TRANSACTIONS ON PROPERTY, INVESTMENTS AND REAL ESTATE

	You	Spouse
Did you sell any real estate property (or properties) in 2021 for which you are claiming a principal residence exemption? If so, fill out Appendix G.	Yes No	Yes No
Did you have any realized capital gains or losses, other than a principal residence, during 2021?	Yes No	Yes No

(If yes to either of the above, we require the following information)

Type of Investment	Please provide the following:
Investments held in a brokerage account (non-registered accounts)	<ul style="list-style-type: none"> Realized capital gain/loss report Summary statement of all stock-transactions, including the Average Cost Base (ACB) for each stock sold
Investments not held in a brokerage account (nonregistered accounts)	<ul style="list-style-type: none"> Summary of all sales, including the original purchase price and the proceeds on sale
Real estate	<ul style="list-style-type: none"> Purchase and sale agreements, statement of adjustments, and other pertinent information
Other investments	<ul style="list-style-type: none"> Purchase and sale agreements, statement of adjustments, and other pertinent information

Investment Advisor

First Name	Last Name
Institution or Firm Name	
Phone Number	
Email	
Does the firm have permission to email your advisor for any missing investment statements needed for your 2021 tax return?	
Yes	No

DEDUCTIONS FROM INCOME – See Appendices

I (We) have Rental Properties and have completed Appendix A	Yes	No
I am (We are) Self-Employed and have completed Appendix B	Yes	No
I am (We are) claiming Home Office Expense and have completed Appendix C	Yes	No
I am (We are) claiming Automobile Expenses and have completed Appendix D	Yes	No
I am (We are) claiming Employment Expenses and have completed Appendix E	Yes	No
I (We) have Foreign Investments and have completed Appendix F	Yes	No
I (We) have disposed of a principal residence and have completed Appendix G	Yes	No

ADDITIONAL INFORMATION

Description – Attach Receipts and Details	Amount	
	You	Spouse
COVID-19 work from home flat rate method (\$2/day, max of \$500)	\$	\$
Instalment payments made to Canada Revenue Agency	\$	\$
RRSP contributions or lump sum transfers	\$	\$
Medical receipts	\$	\$
Donation receipts and political contributions	\$	\$
Child care expenses	\$	\$
Adoption expenses	\$	\$
Canadian caregiver credits	\$	\$
First-time home buyer (please include purchase price and date)	\$	\$
Union, professional, or like dues	\$	\$
Interest on student loans	\$	\$
Moving expenses, if at least 40 kilometres closer to work or school	\$	\$
Interest paid on loans for investment purposes	\$	\$
Investment management fees paid	\$	\$
Other investment related expenses	\$	\$
Teacher supplies expenses	\$	\$
Senior home renovation credit	\$	\$
Tradesperson tools deduction	\$	\$
Volunteer firefighters amount	\$	\$
Training tax credit	\$	\$
Property tax / rent paid	\$	\$
Other – Did we forget something?	\$	\$