

# 2021 Personal Income Tax Checklist

In order to assist us in preparing your 2021 Personal Income Tax return(s) kindly complete the following:

## Personal Information:

Name \_\_\_\_\_  
Name \_\_\_\_\_  
Name \_\_\_\_\_  
Name \_\_\_\_\_

Address:  Same as last year  
 New (please complete):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Marital Status:

Same as last year  
 Changed as of (date): \_\_\_\_\_

New marital status (if applicable):

Married  Common-law   
Separated  Divorced   
Widowed  Single

## Contact Information:

Home Phone: \_\_\_\_\_

Business Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_

E-file Authorization Signing  electronic  paper  
Personal Tax Return  electronic (PDF)  paper

## Dependant Information:

Same as previous year  
 New (please complete chart)

Name	Date of Birth	SIN	Relationship	Net Income	Return to Be Prepared
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No

Are you a Canadian Citizen?  Yes  No

If yes, do you authorize Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors?  Yes  No

Did you own foreign property at any time in 2021 with a cost of over \$100,000 CDN? (If yes, attach details of such property)  Yes  No

Continued on Reverse...

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Please include the following information for each taxpayer:

(If applicable, please check box (✓) if the information is included)

Copy of 2020 Notice of Assessment and prior years' Notice(s) of Reassessment (if applicable)

## All income information slips

Employment  T4  T4A  
COVID-19 Support  T4A  
(CRB, CRSB, CRCB)  
Partnership income  T5013  
Pension payments from employer  T4A  
Interest and dividends  T5  
Mutual fund and other trusts  T3  
Old Age Security  T4A (OAS)

Canada Pension Plan  T4A (P)  
Employment Insurance  T4E  
Income from RRSP  T4RSP  
Income from RRIF  T4RIF  
Purchase and sale of securities  T5008  
Social assistance, WSIB  T5007  
Other (specify)  \_\_\_\_\_

## All official receipts:

RRSP contributions, including   
first 60 days of 2022  
Charitable donations   
Political donations   
Professional dues

Disability tax credit certificate  T2201  
Tuition and enrollment certificate  T2202<sup>1</sup>  
<sup>1</sup>If receipt is from a dependant, please have dependant sign in appropriate place on the form (reverse). If we are not completing dependant's return, please complete the income portion of the form

Self-employment income and expenses (Include HST and COVID-19 support information, if applicable)

Rental property income and expenses (Include HST and COVID-19 support information, if applicable)

Details of employment expenses (Employees must include form T2200 signed by their employer)

Home Office Expenses – COVID-19 Special Deduction (<https://www.canada.ca/en/revenue-agency/services/tax/individuals/topics/about-your-tax-return/tax-return/completing-a-tax-return/deductions-credits-expenses/line-229-other-employment-expenses/work-space-home-expenses.html>)

## Other items:

Support/alimony payments (Please include amount paid or received, the name, address and SIN of payee or recipient, and the date of support agreement)

Child care expenses (Please include receipts)

Moving expenses (Please include receipts)

Medical expenses (Please include official receipts showing payment)

Property taxes or rent paid in the year (Please include the number of months at each location, the address of each location and to whom the amounts were paid)

Home accessibility expenses (For seniors and the disabled. Please contact us for more information.)

Carrying charges and interest paid to earn income from investments

Other Credits: Interest paid on student loans, tradesperson's tools expenses, &/or teaching supplies expenses (for educators only)

Details of disposition of stocks, bonds and mutual funds. (Please include investment broker monthly statements and year end summaries provided by broker)

Disposition of real estate including your principal residence (Please include proceeds of sale, sale date, and ownership. For sales of property other than a principal residence please also include purchase date and original cost)

Direct Deposit (Please include a void cheque for direct deposit if desired, unless already registered)

Instalment payments made during the year (Please include year end statement from CRA)