

2020 Personal Income Tax Checklist

Tax Slips – Please check all that apply:

Client Name(s): _____

Address: _____

Phone number & email: _____

Employment and Retirement Income:

T4 & T4A – Employment Income	Self Employment Income & Expenses (please provide details)
T4A, T4(OAS), T4A(P) – Pension Income	Farming Income & Expenses (please provide details)
T4E – Employment Insurance Benefits	Rental Property Income & Expenses (please provide details)
T4RSP, T4RIF – RRSP withdrawals/RRIF annuity	Did you withdraw from your RRSP in the year?
T5007 – WSIB or Social Assistance	T4A for CERB
T3, T5 – Investment Income (including Trust income)	

Other Receipts & Expenses:

RRSP Contributions - March 3 2020 – March 1 2021	Did you work from home due to the pandemic this year?
Medical Expenses	Childcare expenses including summer camp
Charitable Donations &/or political contributions	
Tuition	
Professional/Union Dues	
Employment Expenses (including vehicle) and T2200 signed by employer	
Property Tax/Rent paid in Year	

Other Items:

Last Year's T1 Return & Notice of Assessment (2 years if possible)	If you sold your home, or moved, please provide details
Income tax instalments paid in year	Please provide details of your dependants including name, date of birth, social insurance number and, if separated or divorced, do they reside with you?
Please confirm whether you are a Canadian Citizen.	If you or one of your dependants is disabled, do you have a Disability Tax Certificate on file with CRA?

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Other Items (cont):

	If you are a Canadian Citizen, do you authorize CRA to provide your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors?		
	Please advise as to your marital status at December 31 and if it changed during the year.		
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Please let us know about any other items not listed.

A note about secure information exchange:

I use a secure portal and encrypted email to exchange documents securely. Please call or email to request an encrypted email from me (to which you can reply) or setup on my portal.

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