**2020 Personal Tax Client Checklist**

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| PERSONAL INFORMATION (if returning client, please indicate only changes) |
| Full Name  | S.I.N.  | Birthdate  | Citizenship  |
| Apt./Suite – Building Number Street Name, City, Postal Code  | Marital Status  |
| Phone  | Cell  | Fax  | Email  |
| SPOUSE INFORMATION (if returning client, please indicate only changes) |
| Full Name  | S.I.N.  | Birthdate  | Citizenship  |
| CHILDREN INFORMATION (if returning client, please indicate only changes) |
| Full Name – Child 1  | S.I.N.  | Birthdate  | Citizenship  |
| Full Name – Child 2  | S.I.N.  | Birthdate  | Citizenship  |
| Full Name – Child 3  | S.I.N.  | Birthdate  | Citizenship  |
| INCOME SOURCES |
| Employment T4/T4A slips  | ☐ | T4 from RRSP, DPSP, RPP, RRIF  | ☐ |
| Pension T4/T4OAS/T4AP  | ☐ | Estates/Trusts/Mutual Funds T3  | ☐ |
| Employment insurance  | ☐ | Other investments T5008 | ☐ |
| Interest/Dividends/Capital Gains T5/T5013  | ☐ | Sale of shares/investments summary | ☐ |
| Rental property income – request a check list | ☐ | Sale of real estate – lawyer stmt. of adjustments | ☐ |
| Self-employment business income – request a check list | ☐ |  | ☐ |
| TAX DEDUCTIONS (with official receipts) |
| RRSP contribution  | ☐ | First-time home buyer in 2020 | ☐ |
| Union/professional dues  | ☐ | Medical expenses  | ☐ |
| Childcare expenses, camps  | ☐ | Disability certificate T2201  | ☐ |
| Tuition fees T2202A – signed by student | ☐ | Charitable donation (Indicate if gift “in-kind”)  | ☐ |
| Moving expenses  | ☐ | Political donations  | ☐ |
| Student loan interest statement  | ☐ | Employer authorization for expenses T2200 | ☐ |
| Interest paid on non-registered investments  | ☐ | Employment expenses – request a check list | ☐ |
| Investment counsel fees  | ☐ | Business – Income and Expenses | ☐ |
| IMPORTANT INFORMATION |
| T1135 Foreign property over $100,000 | ☐ | Sale of the principal residence in 2020 | ☐ |
| Internet business activities | ☐ |  |  |