**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 | | ☐ |  | | |  |