Personal Tax Return
2020
T1 Checklist

Taxpayer Information

Yes	No	
		Are you a Canadian Citizen?
		**If you answered YES to the above question-Do you authorize CRA to provide your name, address and date of birth to Elections Canada?
		Did you own foreign property at any time during the year with a total cost of more than $100, 000? (See foreign property memo for further details).
		Did you dispose of any capital assets in the year? (E.g. shares, mutual funds, real estate property) If so, provide details-see capital gains worksheet.
		Did you dispose of principal residence in the year? (provide details)
		Are you a US Citizen (Green card holder)?
		Do you reside in the US for part of the year?

How would you like your tax return delivered?

☐ Courier ☐ Pick Up ☐ Electronically (PDF) If so, provide email address:

☐ Mr. ☐ Mrs. ☐ Miss. ☐ Dr. ☐ Sir

First Name:		Home Phone:	
Last Name:		Work Phone:	
Street Address:		Fax:	
City, Province, Postal Code:		Email:	
Social Insurance Number:			
Birthdate:		Date of Death:	

Date of departure from or entry to Canada, if within the year

Marital Status:

☐ Single ☐ Married ☐ Separated ☐ Divorced ☐ Widowed ☐ Commonlaw

If marital status changed in the year, please indicate date of change:

SPOUSE (where applicable):

☐ Mr. ☐ Mrs. ☐ Miss. ☐ Dr. ☐ Sir

First Name:		Home Phone:	
Last Name:		Work Phone:	
Street Address:		Fax:	
City, Province, Postal Code:		Email:	
Social Insurance Number:		Net Income:	
Birthdate:			

CHILDREN/ DEPENDENTS:

Name:			
Birthdate:			
SIN:			
Relationship:			
Tuition Fees:			
Net Income:			

TAX INFROMATION CHECKLIST	Please provide details or receipts on the following

INCOME

- [ ] T4 - Salaries and Employment Income
- [ ] T4A – Pension, Retirement, Annuity and other income
- [ ] T4A (P) - Canada Pension Plan Benefits
- [ ] T4A(OAS) - Old Age Security Benefits
- [ ] T4RSP – RRSP Income
- [ ] T4RIF - RRIF Income
- [ ] T4E- Employment Insurance Benefits
- [ ] T5007 – WSIB, Social Services Benefits
- [ ] T5008 – Statement of Security Transactions
- [ ] Scholarships/Bursaries (T4A)
- [ ] Other Employment Benefits
- [ ] Spousal Support Payments Received (provide details)
- [ ] T4A-COVID Benefits received (CERB,CRCB,CRSB,CRB,CESB)
- [ ] T5, T4PS – Interest/Dividends/Profit Sharing
- [ ] Interest on Tax Refund (s)
- [ ] T3 – Trust/Mutual Fund Income
- [ ] T5013 – Limited Partnership Income /(Loss)
- [ ] Foreign Income (e.g. foreign pensions, investment income)
- [ ] Rental Income/Expenses (Full details required) *
- [ ] Gratuities and tips
- [ ] Self-Employed Income (Business, Professional, Commission)*

If you have self-employed income, provide details of income earned from website/webpages*

- [ ] **Other**-Specify

- [ ] Details of any property sold in the year (real estate, non-registered investments, etc.) *

If you bought/sold any non-registered investments in the year provide trading summary/realized capital gains reports from your broker (review for accuracy).

NON-REFUNDABLE CREDITS

- [ ] Spouse/Common-law Partner amount
- [ ] Eligible Dependent amount
- [ ] Disability Deductions (self/spouse/children) (include T2201 if first time claim)
- [ ] Home Buyers Tax Credit (for first time home buyers)
- [ ] T2202A tuition receipts
- [ ] For students, receipts for rent paid while living away
- [ ] Interest Paid on Student Loans
- [ ] Attendant Care Expenses/Nursing home
- [ ] Medical Receipts (non-reimbursed amounts only)

Obtain one statement from the pharmacist, dentist, chiropractor, etc. for payments made in the year and have separate statements for each family member.

- [ ] Senior's Public Transit Tax Credit (Ontario-age 65 and older)
- [ ] Political Contributions Receipts (Federal & Provincial)
- [ ] Caregiver Amounts
- [ ] Charitable Donation Receipts
- [ ] Adoption expenses
- [ ] Eligible educator school supplies (include receipts)
- [ ] Volunteer firefighter amount
- [ ] Search and rescue volunteer's amount
- [ ] Home accessibility expenses (federal)
- [ ] Digital News Subscription Expenses (provide receipt giving-subscription, QCJO designation number, amount paid, date paid)

* Please fill in additional schedules for further information required (linked in Excel)

DEDUCTIONS

- [ ] RRSP Contribution Receipts
- [ ] Union, Professional Dues
- [ ] Spousal Support Paid (provide details)
- [ ] Carrying Charges on Investments
- [ ] Investment Counsel and Accounting Fees
- [ ] Employment Expenses (full details required) *
- [ ] Deductible Legal Fees (eg.to collect salary or support)
- [ ] T2200 – Declaration of Conditions of Employment
- [ ] Property taxes or rent paid on principal residence
- [ ] Business Use of Vehicle
- [ ] TL2 – Claim for Board and Lodging Expenses
- [ ] Child Care Expenses (full details required)
- [ ] Moving Expenses (full details required)
- [ ] Allowable Business Investment Loss
- [ ] Capital Losses Carry Forward
- [ ] Non-Capital Losses Carry Forward
- [ ] Employment Insurance Benefits Repayments
- [ ] Clergy Residence Deduction Form T1223
- [ ] Home Office Expenses
- [ ] COVID Home Office Expenses

OTHER INFORMATION

- [ ] Separation Agreement (where applicable)
- [ ] 2019 Notice of Assessment
- [ ] Summary of Installment Payments
- [ ] Details of sale of your principal residence (address, sale price, owners, year of acquisition).
- [ ] Details of any change of use of your principal residence in the year (to/from rental property)
- [ ] Copy of prior year tax return if first time client
- [ ] 2020 final property bill or rental receipts

OTHER INFORMATION

- [ ] See T1 foreign property memo

Have your brokers provide details of any foreign property held in your non-registered accounts (the total in multiple accounts could be more than $100,000, so you should get for all your non-registered accounts).

- [ ] In form us if you are a US Citizen or Green Card holder
- [ ] Details US IRA/401(K)

If you have any questions, please feel free to contact Trish - trish@kenbell.ca