

Personal Income Tax Return

Checklist 2020



Tax Season is upon us again! Plugged-IN CPA Accounting and Tax is pleased to invite you to have your tax return prepared by our professional staff. It is time to start pulling together all those various pieces of paper and information that we need to prepare your 2019 personal income tax return.

This checklist is to help you navigate the information we will need.

Thank you for your continued confidence in our services. We look forward to working with you in the coming weeks.

Plugged-IN CPA

Hours:

Mon - Fri

8:30 -5:00

If any of the following information has changed (or you are a new client) please provide the following information:

Name:				Spouses Name:		
Address:						
Email Address:				Phone Number:		
Self	<i>Sin:</i>			<i>Birthdate:</i>		
Spouse	<i>Sin:</i>			<i>Birthdate:</i>		
Marital Status:	<i>Married</i>	<i>Widowed</i>	<i>Divorced</i>	<i>Single</i>	<i>Seperated</i>	<i>Common Law</i>
Children 1:			Children 2:		Children 3:	
<i>Name:</i>			<i>Name:</i>		<i>Name:</i>	
<i>Sin:</i>			<i>Sin:</i>		<i>Sin:</i>	
<i>Date of Birth:</i>			<i>Date of Birth:</i>		<i>Date of Birth:</i>	

Income:			If yes please provide:
Salary/employment income	Yes	No	T4 slip from employer
Pension/annuity income	Yes	No	T4A/T4A(P)/T4A(OAS)
Foreign pension income	Yes	No	Country, type, currency
RRSP/RRIF income	Yes	No	T4RSP, T4RIF
Dividend/investment	Yes	No	T5/T5013
Trust/mutual fund income	Yes	No	T3
Self-employed income	Yes	No	See appendix
Capital gain/losses on sale	Yes	No	Trading income summary, realized gain/loss report and monthly/quarterly statements
Other income	Yes	No	Details or slips

Other Information:	
Do you have assets outside of Canada, including foreign stocks in excess of \$100,000 Canadian?	
If you wish to be setup with direct deposit from CRA attach a void cheque	
Do you authorize CRA to provide information about you to Elections Canada?	
Is there more tax information which you are still waiting for?	
Did you sell or buy your house during the year?	
Have you had any major life changes: Marital status, children	
Did you work from home in 2020?	

Deductions and Credits			If yes please provide:
RRSP Contributions	Yes	No	Tax receipts – may include first 60 days of current year
Home Buyers Plan or Lifelong learning plan	Yes	No	Amount of any HBP or LLP repayment
Union or professional dues	Yes	No	Tax receipts (if not listed on T4)
Child care/ summer camp for your children	Yes	No	Official receipts
Public transit pass	Yes	No	Total for the year
First-time home buyers tax credit	Yes	No	Date when home was purchased
Moving expenses (for job)	Yes	No	Details – must have moved at least 40km closer to work
Investment income expenses	Yes	No	Interest expenses, fees etc.
Employment Expenses	Yes	No	See appendix
Student Loan interest	Yes	No	Tax receipt
Tuition fees	Yes	No	T2202A
Medical expenses	Yes	No	Official receipts – contact your pharmacy or insurance provider for a summary of the year. As well. Please provide a summary of any travel over 40 KM one-way for medical purposes
Charitable donations	Yes	No	Tax receipts
Political donations	Yes	No	Tax receipts

If you are a new client, please provide us with your prior year tax return.

As the information in this checklist doesn't address all income tax matters and is abbreviated for simplicity, please contact one of our knowledgeable staff at 506-455-5397 for further information, details or clarification.

Thank You!