

## PERSONAL INCOME TAX CHECKLIST

This questionnaire is designed to assist you in compiling the information necessary to prepare your personal income tax return(s). Please attach all applicable slips, receipts and supporting information.

**Please include one completed form per couple or taxpayer when submitting your documentation.**

Full Name \_\_\_\_\_ Birthdate (M/D/Y) \_\_\_\_\_  
 Full Name (Spouse) \_\_\_\_\_ Birthdate (M/D/Y) \_\_\_\_\_  
 Phone \_\_\_\_\_ Best time to call  AM  MIDDAY  PM  
 Email Address \_\_\_\_\_ Primary Contact \_\_\_\_\_

**Sync Bookkeeping is attempting to reduce our impact on the environment. Will you consent to receiving your income tax return electronically?**



- Yes, send via secure email to \_\_\_\_\_  
 Yes, but send my spouse's package to \_\_\_\_\_  
 No, I prefer to receive a paper package

Did you move or change your mailing address in 2020?  Yes  No

If yes, please provide your new address \_\_\_\_\_

Has your marital status changed?  Yes  No

If yes, indicate the type of change \_\_\_\_\_ Effective date of change (M/D/Y) \_\_\_\_\_

Has your number of dependants changed in 2020? \*  Yes  No

\* Dependants can include children or adult dependant relatives living with you.

If yes, please provide dependant's full name, birthdate, social insurance number and relationship to you.

Are you claiming the disability tax credit for any family member? (if unsure, please ask)  Yes  No

Are you a Canadian citizen?  Yes  No

If yes, should your name, address, date of birth, and citizenship information be supplied to Elections Canada?  Yes  No

Do you have citizenship or a residence in any country other than Canada?  Yes Country: \_\_\_\_\_

Did you sell any Cryptocurrency in 2020?  Yes  No

In 2020, in total did you own non-Canadian property (cash, shares, loans, trusts, real property, or property held thru a Canadian registered securities dealer or Canadian trust company) with an aggregate cost in excess of CAD\$100,000?  Yes  No  Unsure

In 2020, did you own shares in any non-Canadian corporations?  Yes  No  Unsure

Please check off applicable items:

INCOME	
<input type="checkbox"/>	<b>T4</b> - Employment Income
<input type="checkbox"/>	<b>T4A(OAS)</b> - Old Age Security
<input type="checkbox"/>	<b>T4A(P)</b> - Canada Pension Plan benefits
<input type="checkbox"/>	<b>T4A, T4RSP, T4RIF</b> - Retirement or Other Income
<input type="checkbox"/>	<b>T4E</b> - Employment Insurance
<input type="checkbox"/>	<b>RC62</b> - Universal Child Care Benefits
<input type="checkbox"/>	<b>T5</b> - Interest, Dividends or Investment income
<input type="checkbox"/>	<b>T3</b> - Mutual Funds and other Trust Income
<input type="checkbox"/>	<b>T5013</b> - Partnership Income/Losses
<input type="checkbox"/>	<b>T5007</b> - WorkSafeBC or Social Assistance Income
<input type="checkbox"/>	<b>T5008</b> - Capital Gains/Losses on securities sales Did you sell or change the use of any real estate, including your principle residence in 2020? (attach details of sale and original purchase)
<input type="checkbox"/>	Did you sell any investments in 2020? (attach details of sale and original purchase)
<input type="checkbox"/>	Business, Professional, Commission or Farming (attach details of income, expenses, purchases and sales – use separate schedule)
<input type="checkbox"/>	Rental (attach details of income, expenses, purchases and sales)
<input type="checkbox"/>	If business or rental assets were purchased, provide appropriate documents
<input type="checkbox"/>	Child or Spousal support received (provide divorce or separation agreement)
<input type="checkbox"/>	Other Income (e.g., stock options, annuities, scholarships, bursaries, research grants)

DEDUCTIONS	
<b>Please summarize your information where necessary and provide supporting documentation</b>	
<input type="checkbox"/>	RRSP contributions
<input type="checkbox"/>	Annual union or professional dues
<input type="checkbox"/>	Child care expenses
<input type="checkbox"/>	Attendant care expenses
<input type="checkbox"/>	Investment Losses
<input type="checkbox"/>	Moving expenses (you moved at least 40km closer to a <u>new</u> work location)
<input type="checkbox"/>	Employment or commission expenses (include details <u>and T2200</u> or <b>TL2</b> signed by employer)
<input type="checkbox"/>	Carrying charges, interest expense and/or investment counsel fees
<input type="checkbox"/>	Alimony/spousal support paid (provide divorce/separation agreement)
<input type="checkbox"/>	Charitable donations and political contributions
<input type="checkbox"/>	Medical and dental expenses and private health insurance premiums for all family members
<input type="checkbox"/>	Disability Tax Credit for you or a dependant
<input type="checkbox"/>	Adoption expenses
<input type="checkbox"/>	Tuition fees (attach <b>T2202/T2202A</b> )
<input type="checkbox"/>	Student loan interest paid
<input type="checkbox"/>	Claim for first-time home buyer's tax credit
<input type="checkbox"/>	Clergy residence deduction (attach Form T1223)
<input type="checkbox"/>	Other deductions and expenses

OTHER	
<input type="checkbox"/>	Tax Installments paid for 2020
<input type="checkbox"/>	Any correspondence received from Canada Revenue Agency in the past year
<input type="checkbox"/>	Information to set up or change direct deposit service with Canada Revenue Agency
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