

2020 PERSONAL INCOME TAX RETURN CHECKLIST

Express Sign-off

Meeting requested

Returning clients, include changes in 2020.

New clients complete all sections.

Your legal name as it appears with the Canada Revenue Agency: _____

SIN: _____ Birthdate: _____

Address as it appears with the Canada Revenue Agency: _____

Preferred method of contact		Marital Status	
Home telephone: _____	<input type="radio"/>	<input type="radio"/> Single	<input type="radio"/> Separated
Mobile telephone: _____	<input type="radio"/>	<input type="radio"/> Common-law	<input type="radio"/> Divorced
Email Address: _____	<input type="radio"/>	<input type="radio"/> Married	<input type="radio"/> Widowed

If your marital status changed in 2020, please supply date of change: _____

Spouse name: _____ Spouse SIN: _____

Spouse birthdate: _____ Alternate telephone: _____

Dependent children:	Name	Son/Daughter	Birthdate	SIN	Disabilities Y/N	Income Y/N
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Are you a Canadian Citizen?	Yes	No
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Do you authorize Canada Revenue Agency (CRA) to provide your name, address and date of birth to Elections Canada for the National Register of Electors?	Yes	No
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Did you own foreign property, or hold foreign investments at any time during 2020 with a total cost of all holdings in excess of C\$100,000?	Yes	No
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Did you buy or sell a principal residence in 2020?	Yes	No
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Did you buy or sell other real estate in 2020?	Yes	No
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Do you have a Disability Tax Credit certification?	Yes	No
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Do you have a Will?	Yes	No	If yes, name of executor: _____
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Do you have a Power of Attorney?	Yes	No	If yes, name of PoA: _____
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Ask us for our easy-fill forms for self-employment income, farm income, rental income and medical travel

Please supply slips or related documents for income and deductions.

If you purchased **RRSPs** for 2020, please include all slips including slips for the first 60 days of 2021.

We will prepare your 2020 personal income tax return based on the information that you provide to us. We will not audit or otherwise verify the data you submit, although we may ask you for clarification of some of the information. It is our responsibility to prepare your tax return correctly according to the law and the information that you have provided. It is your responsibility to provide us with all the information required to prepare complete and accurate returns.