



INDIVIDUAL INCOME TAX (T1 RETURN) CHECKLIST

If you're behind on personal taxes or need to file, we prioritize maximizing your refunds using the latest CRA tax credits and deductions from Federal and Provincial Budgets. Whether you sell a rental property or run a business, we provide expert tax planning to reduce your tax balance and help you build equity through homeownership or rental property investments.

**** New clients, please fill out all sections**

PERSONAL INFORMATION

Name:

Email:

Phone:

Birthdate:

Address:

SIN:

Are you a Canadian Citizen?

Yes

No

Do you provide information to Elections Canada?

Yes

No

During the year, did you own foreign property costing over \$100,000 CAD?

Yes

No

Would you like to sign up for online mail from the CRA?

Already have

Yes

No



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SPOUSAL INFORMATION

Marital Status:

Married Common Widowed Divorced Separated Single

Has your Marital Status changed during the year?

Yes No

Date of Status Change:

**** If we are not preparing your spouse's tax return, please complete below**

Spouse Name: _____

SIN: _____

Birthdate: _____

Net Income: _____

PERSONAL INCOME

Were you an employee during the year?

- Include T4, T4A slips received from each other during the year
- Include T4E, T5007 from Service Canada if you received social assistance
- Include the amount of tips received (if applicable) during the year

Did you have your own business during the year?

**** Complete the Business Income and Employment Expenses Worksheet**

Did you receive any emergency income (benefits & services due to Covid-19)

- Include T4A Received from Service Canada

Were you retired in the year?

- Include T4A, T4RIF slip related to each pension received during the year
- Include T4A(P), T4AOAS slips if you received CPP or OAS benefits in the year

Did you own any investments outside of a Tax Free Savings Account or RRSP during the year?

**** Complete the Rentals & Investments worksheet**



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Did you own a rental property in the year?

**** Complete the Rentals & Investments Worksheet**

EXPENSES

Did your employer require you to incur costs as part of your employment, including working from home?

**** Complete the Business Income & Employment Expenses Worksheet**

Did you pay any union or professional dues?

Include copy of receipts

Did you incur medical expenses?

Include copy of all medical receipts (Cash registers receipts are not sufficient)

Did you donate funds to a charity or a political party?

Include copy of the donation receipt issued

Were you enrolled in post-secondary school full/part time?

Include T2202A Slip from each school attended

If student loan is in repayment, print off repayment schedule from NSLSC

Did you pay rent or property taxes in the year?

How much did you pay, and who was it payable too? (Have receipts available)

Did you have a Canadian digital news subscription(s)?

Include copy of receipts

OTHER

Did you have to pay personal taxes by installments for the year?

Include statement of account from CRA noting amount paid for the year

Please provide a copy of all Notices of (Re)assessments received

Do you have children?

**** Complete the Dependent Worksheet**

Did you pay or receive support payments (child or spousal)?

**** Complete the Dependent Worksheet**



INDIVIDUAL INCOME TAX (T1 RETURN) CHECKLIST

Do you, or anyone in your care suffer from a physical or mental disability?

**** Complete the Dependent Worksheet**

Did you adopt a child in the current year?

Include copy of receipts associated with adoption

Did you volunteer as a firefighter, or search & rescue?

Please provide work contract



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DEPENDENT WORKSHEET

CHILDREN

Name	Birthdate	SIN	Lives with me (Y/N)	Gender
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

If not married or common law, who do your children primarily reside with?

Did you send your children to camp or pay for daycare? (including a nanny)?

Include copy of Receipts

Did you enroll your children in supervised activities lasting over 1 hour in duration?

Include copy of Receipts

Did your child attend post-secondary education?

Include Tuition form T2202A from your child's university/college

SUPPORT PAYMENTS

Support payments were: Paid by me Received by me

Name of Spouse: _____

SIN of Spouse: _____

Child Support Amount: _____

Spousal Support Amount: _____

FAMILY DISABILITIES - please call or email us to discuss your specific situation

Include Form T2201 - Disability tax credit certificate completed by your doctor



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RENTALS AND INVESTMENTS WORKSHHET

INVESTMENTS

Did you contribute to your RRSP before March 1 of the current year?

- RRSP Contribution receipts for "the remainder of the year"
- RRSP Contribution receipts for the first 60 days following the year

Did you withdraw money from your RRSP?

- T4RSP slips

Investments - Not in RRSP/TFSA

Did you sell any securities during the year?

- Capital gains report for the year
- Broker statements for the year if we track the cost bases for you

Did you earn any income from the investments?

- T5 slips received for the year (these are issued before February 28th?)
- T3/T5013 slips received for the year (these are issued before March 31st)

RENTAL PROPERTY

Was this property purchased or sold in the year?

- Purchase and sale documentation
- Summary of income and expenses for each rental property owned

**** Please complete property information and related expenses below**



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Address:

of units:

Personal Portion:

%

Total Rent
Revenue:

Advertising:

Utilities:

Property
Taxes:

Repairs:

Insurance:

Interest:

Other Expenses (if applicable)

<hr/>	:	<hr/>		<hr/>	:	<hr/>
<hr/>	:	<hr/>		<hr/>	:	<hr/>



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BUSINESS INCOME & EMPLOYMENT EXPENSES WORKSHEET

BUSINESS INCOME

Do you have an HST return that needs to be filed?

- Copy of HST form with access code
- Statement of account from CRA with total instalments paid for the year

Are computerized records maintained?

- Profit and loss statement for the year (if complete)
- Summary of business income and expenses for each business operated

Occupation: _____

Total Revenue: _____ **Cost of Sales:** _____

Advertising: _____ **Meals & entertainment:** _____

Insurance: _____ **Licenses & Memberships:** _____

Office: _____ **Salaries & Subcontracting:** _____

Travel: _____ **Telephone & internet:** _____

Rent: _____ **Home office & automobile:** **** Complete the Home & Auto worksheets**

Other Expenses (if applicable)

_____ : _____ : _____

EMPLOYMENT EXPENSES

Do you have a signed T2200 - Declaration of Conditions of Employment

- Please provide a copy

Did you have to work from home due to COVID-19?

- Please provide a copy of a signed T2200s (if possible)

**** Complete the Home Worksheet**



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Does your employer collect GST/HST on their revenue?

- Yes No Unsure

What expenses have you incurred for the year?

Advertising: _____

Meals & Entertainment: _____

Cell Phone: _____

Tools & Supplies: _____

Assistant Salary: _____

Home Office & Automobile: ** Complete the Home & Auto worksheets



INDIVIDUAL INCOME TAX (T1 RETURN) CHECKLIST

HOME OFFICES WORKSHEET

HOME OFFICE EXPENSES

Internet: _____

Business Use: _____

%

Heat: _____

Electricity: _____

Insurance: _____

Maintenance: _____

Mortgage Interest: _____

Property Tax or Rent: _____

Other Expenses (if applicable)

_____ : _____ : _____

Number of days you worked from home due to COVID-19: _____

My home office is:
*(I.E. dining room)

Dedicated office space

Shared office space



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AUTOMOBILE EXPENSES WORKSHEET

AUTOMOBILE EXPENSES

Did you purchase or lease a new car this year?

Copy of the purchase or lease agreement

Make of car: _____

Year: _____

Total KM driven: _____

Business KM driven: _____

Fuel: _____

Insurance: _____

License: _____

Maintenance: _____

Leasing: _____

Parking: _____

407 Tolls: _____

: _____

Other Expenses (if applicable)

_____ : _____ : _____