MACIEL & COMPANY

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Personal Tax Checklist

For Tax Year: 2020

Kindly review the list and provide us with all of the relevant necessary information.

Name:	Spouse's name:
Date of birth:	Spouse's date of birth:
Social Insurance Number:	Spouse's Social Insurance Number:
Canadian Citizen YES NO	Canadian Citizen YES NO
Children's name(s), birthdates and income (if minors)	Children's name(s), birthdates and income (if minors)
Email address:	Spouse's email address:
Address (include postal code):	
Telephone:	Spouse's Telephone:

❗ **Foreign property: Did you or your spouse own foreign property at any time in 2020 with a total cost of more than CAN$100,000?** **YES** **NO**

❗ **Principal Residence: Did you sell your home during 2020? (If yes, provide us with the address, year of acquisition, and sale price)** **YES** **NO**

You	*Spouse*	**Income**
☐	☐	Employment (T4)
☐	☐	Employment Insurance (T4E)
☐	☐	Scholarship/Bursary/RESP (T4A)
☐	☐	WCB/Social Assistance (T5007)
☐	☐	CERB Benefits (T4A)
		Pensions
☐	☐	Pension (T4A)
☐	☐	Canada Pension Plan (T4AP)
☐	☐	Old Age Security (T4OAS)
☐	☐	RRIF Withdrawal (T4RIF)
☐	☐	RRSP Withdrawal (T4RSP)
		Investments
☐	☐	Interest/Dividend Income (T5/T3)
☐	☐	Estates/Trusts/Mutual Funds (T3)
☐	☐	Disposal of Investments **(T5008 or Realized Gain/Loss report from broker)**
☐	☐	Partnership Income (T5013)
☐	☐	Accounting Fees
☐	☐	Investment Counsel Fees (Excluding RRSP/TFSA)
☐	☐	Interest on Investment Loans (Excluding RRSP/TFSA)
☐	☐	Sale of Investment Property **(Provide lawyer's statement of adjustments for sale and purchase)**
☐	☐	Details of Foreign Investments (if cost over $100,000)

You	*Spouse*	**Deductions - *Provide Receipts***
☐	☐	RRSP Contributions
☐	☐	Union/Professional Dues
☐	☐	Child Care Expenses
☐	☐	Spousal Support (Provide Details and Agreement)
☐	☐	Employment Expenses (T2200 and Receipts)
		Tax Credits - *Provide Receipts*
☐	☐	First Time Home Buyer
☐	☐	Disability Amount (Must have filed T2201 with CRA)
☐	☐	Interest on Student Loans
☐	☐	Tuition (Provide T2202A Slip)
☐	☐	Medical Expenses (incl. private health & travel insurance)
☐	☐	Charitable/Political Donations
☐	☐	Tax Instalments (Provide CRA Statement)
☐	☐	Care Home Tax Receipt
		Other Income & Deductions - *Worksheets Required*
☐	☐	Self-Employment Income
☐	☐	Business Related Automotive Expenses
☐	☐	Business Use of Home Office Expenses
☐	☐	Rental Property Revenues and Expenses
☐	☐	Moving Expenses
		Additional Information Required
☐	☐	CRA's 2019 Notice of Assessment
☐	☐	Spouse's Net Income (if we are not preparing their return)
☐	☐	Details of Additional Dependants (if not stated above)
☐	☐	Date of Marital Status Change (if applicable)

Required worksheets are available at our office or online at www.jmi.ca/tax-resources

<u>Please bring in your documents at the earliest convenience.</u>