

## PERSONAL INCOME TAX CHECKLIST – 2021

Tax Information Slips	Credits/Deductions	Other documentation
<ul style="list-style-type: none"> <li><input type="checkbox"/> T4 Slips</li> <li><input type="checkbox"/> RRSP contribution slip</li> <li><input type="checkbox"/> Employment Insurance benefits (T4E)</li> <li><input type="checkbox"/> Interest, dividends, mutual funds (T3, T5)</li> <li><input type="checkbox"/> Statement of Securities Transactions (T5008)</li> <li><input type="checkbox"/> Tuition/education receipts (T2202A)</li> <li><input type="checkbox"/> Old Age Security and CPP benefits (T4A-OAS, T4AP)</li> <li><input type="checkbox"/> Other pensions and annuities (T4A)</li> <li><input type="checkbox"/> Social assistance payments (T5007)</li> <li><input type="checkbox"/> Workers' compensation benefits (T5007)</li> <li><input type="checkbox"/> All other tax information slips</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Professional or union dues</li> <li><input type="checkbox"/> Medical expenses</li> <li><input type="checkbox"/> Charitable donation receipts</li> <li><input type="checkbox"/> Political contributions</li> <li><input type="checkbox"/> Childcare expenses for children under 16</li> <li><input type="checkbox"/> Interest paid on student loans</li> <li><input type="checkbox"/> Interest paid for any investments</li> <li><input type="checkbox"/> Office-in-home expenses (if applicable)</li> <li><input type="checkbox"/> Exams for professional certification</li> <li><input type="checkbox"/> Tool expenses (Tradespersons)</li> <li><input type="checkbox"/> Support for a child, spouse, or common-law partner</li> <li><input type="checkbox"/> Eligible educator school supplies expense</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Summary of income earned and expenses incurred if you're a sole proprietor (T2125) - (Uber/Lyft)</li> <li><input type="checkbox"/> Declaration of Conditions of Employment (T2200)</li> <li><input type="checkbox"/> Disability Tax Credit Certificate</li> <li><input type="checkbox"/> Direct deposit banking information (if it has changed)</li> </ul>
COVID-19 Benefits	Work from home during COVID-19 in 2021?	Additional Questions to review
<ul style="list-style-type: none"> <li><input type="checkbox"/> T4A-CERB/CESB/CRB/CRCB/CRSB</li> <li><input type="checkbox"/> Did your sole-proprietor business receive CEWS/CERS/CEBA?</li> </ul> <p>As no slips are provided specific to these programs, please provide the amounts received and the period to which they related.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Simplified method (Employees only - No signed document provided by employer)</i></li> </ul> <p>Did you work from home four consecutive weeks in a row? (Yes/No) _____ How many days did you work from home in 2021? _____</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Detailed method (Employees and non-employees, T2200S provided by employer)</i></li> </ul> <p>Your employer will be providing you with a signed T2200 short form.</p> <p>Provide a list of your work from home expenses.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Did you sell your principal residence in 2021? If yes, please provide the purchase price, sale value, year of purchase, date of sale.</li> <li><input type="checkbox"/> Did you sell your investment property in 2021? If yes, please provide the purchase price, sale value, and your expenses to complete the sale.</li> <li><input type="checkbox"/> Did you buy or sell stocks or cryptocurrency (Bitcoin) in a non-registered account (non-RRSP/TFSA)? If yes, please provide the adjusted cost base at purchase and the proceeds from the sale.</li> </ul>
<b>Rental Property Details: Address _____   Rental Period _____</b>		
<ul style="list-style-type: none"> <li>1) Rental Income: _____</li> <li>2) Advertisement (realtor fees): _____</li> <li>3) Mortgage Interest: _____</li> <li>4) Property Tax: _____</li> </ul>	<ul style="list-style-type: none"> <li>5) Utilities (Gas, Hydro, and Water): _____</li> <li>6) House Insurance: _____</li> <li>7) Cable: _____</li> <li>8) Internet: _____</li> </ul>	<ul style="list-style-type: none"> <li>9) Mortgage Insurance: _____</li> <li>10) House Repair: _____</li> <li>11) Condo Maintenance Fees: _____</li> <li>12) House Alarm: _____</li> </ul>

