

2020 PERSONAL INCOME TAX CHECKLIST ENCOMPASS CPA INC.

Instructions: Please complete this checklist and return it to us with your 2020 personal income tax information (slips and receipts)

	SELF	SPOUSE
Name(s):		
Date of Birth: (month/day/year)		
Social Insurance Number (SIN):		
Address:		
Email:		
Telephone:		
Province of Residence on Dec 31		
Canadian Citizen: Y/N		
US Citizen: Y/N		
Self-employed: Y/N		
Net Income of Spouse – Line 236 (if we are not preparing the return)		
Did you dispose or change the use of a property for which you are claiming the Principal Residence Exemption? If so, please provide the address, purchase date, date of sale, original cost, proceeds of disposition, a copy of the sales agreement.		

Dependants (children/parents whom you financially support):

Name	Birth Date	Net Income	S.I.N.
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Yes No

Canadian citizens only - Do you authorize the Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada for the National Register of Electors?

Marital Status: Single Married Separated Divorced Widowed Common-Law Date if changed: _____

Did you have any of the following types of income and/or deductions? If so, check the appropriate box(es) and provide the tax slips:

INFORMATION SLIPS	SLIP NAMES	SELF	SPOUSE
Employment	T4, T4A	<input type="checkbox"/>	<input type="checkbox"/>
Partnership income	T5013	<input type="checkbox"/>	<input type="checkbox"/>
Pension or disability payments	T4A	<input type="checkbox"/>	<input type="checkbox"/>
Interest, dividends	T5	<input type="checkbox"/>	<input type="checkbox"/>
Mutual funds and other trusts	T3	<input type="checkbox"/>	<input type="checkbox"/>
Old age security	T4A(OAS)	<input type="checkbox"/>	<input type="checkbox"/>
Canada pension	T4A(P)	<input type="checkbox"/>	<input type="checkbox"/>
Employment insurance	T4E	<input type="checkbox"/>	<input type="checkbox"/>
RRSP or RRIF income	T4RSP, T4RIF	<input type="checkbox"/>	<input type="checkbox"/>
Canadian Exploration / Development Expenditures	T101	<input type="checkbox"/>	<input type="checkbox"/>
Purchase and sale of securities	T5008	<input type="checkbox"/>	<input type="checkbox"/>
Social assistance, workers compensation	T5007	<input type="checkbox"/>	<input type="checkbox"/>
Foreign income verification statement	T1135	<input type="checkbox"/>	<input type="checkbox"/>
Foreign pensions		<input type="checkbox"/>	<input type="checkbox"/>
Other, including all foreign slips		<input type="checkbox"/>	<input type="checkbox"/>
Details for any other investments held such as Cryptocurrency (e.g. Bitcoin)		<input type="checkbox"/>	<input type="checkbox"/>

Please note – as residents of Canada, all income and expense items refer to worldwide income and expenses. As penalties are levied for missing slips, it is important that you review the slips to ensure you have all of them.

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DEDUCTIONS AND EXPENSES	SLIP NAMES	SELF	SPOUSE
Registered Retirement Savings Plan Contributions	RRSP		
Charitable Donations			
Political Donations			
Medical and Dental receipts			
Professional or Union Dues			
Tuition Fees	T2202/ T2202A/ TL 11A		
Student loan interest			
Carrying charges and interest paid to earn income from investments (including management fees)			
Support and/or alimony payments paid or received		<input type="checkbox"/>	<input type="checkbox"/>
Amount of tax instalments made for 2020	CRA statement	<input type="checkbox"/>	<input type="checkbox"/>

OTHER INFORMATION:	SELF	SPOUSE
Self-employment income and expenses:	<input type="checkbox"/>	<input type="checkbox"/>
Province of self-employment:		
GST account number (if applicable):		
Please provide a summary of income and expenses or bring in books and records		
Automobile:	<input type="checkbox"/>	<input type="checkbox"/>
Receipts (gas, repairs and insurance, lease/purchase agreement)		
Total kilometres driven for the year:		
Business kilometres driven for the year:		
Home office expenses:	<input type="checkbox"/>	<input type="checkbox"/>
Total home and office square footage:		
Please provide a summary of expenses of total utilities, property taxes, insurance, mortgage interest, rent, and repairs and maintenance.		
Rental Income:	<input type="checkbox"/>	<input type="checkbox"/>
Please provide details of addresses, rents and expenses of each property including all interest and/or mortgage details.		
Include Purchase and Sale Agreements (including statement of adjustments) for new purchases during the year or disposals during the year		
If the rental property is also recreational, provide the number of days of personal use		
Details of employment expenses:	<input type="checkbox"/>	<input type="checkbox"/>
Please attach Form T2200 signed by employer		
Attach a summary of details of all expenses that may include auto, entertainment, travel, or home office (CRA website has information on what qualifies as deductions – search "Line 229 employment expenses")		
Moving Expenses:	<input type="checkbox"/>	<input type="checkbox"/>
Child care expenses (including Daycare, Nanny, Day camps, Overnight camps):		
Nanny's name and SIN, T4 slip or details of amounts paid and receipt provided		
Purchase of Principal Residence:		
Did you acquire a home in 2020 that you intend to occupy as a principal residence within a year of purchase that will qualify for the first-time home buyer's amount?	<input type="checkbox"/>	<input type="checkbox"/>
Other Items:		
Details of renovation expenses incurred to your home to improve accessibility/mobility	<input type="checkbox"/>	<input type="checkbox"/>
If eligible, do you wish to split pension income with your spouse: Y/N	<input type="checkbox"/>	<input type="checkbox"/>
Are you entitled to a disability amount for yourself or a dependant? (provide T2201)	<input type="checkbox"/>	<input type="checkbox"/>

FOREIGN PROPERTY REPORTING (please contact us if you require assistance):

Did you own specified foreign property at any time during 2020, the aggregate cost of which exceeded \$100,000 CAD? (This includes foreign stocks, bonds, real estate, or other investments that were not held in Canadian based mutual funds or pooled funds)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Did you earn any income or realize any gains from foreign property in 2020?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Did you loan or transfer funds or property to a non-resident trust in 2020 or any previous years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Did you receive funds or property from, or were you indebted to, a non-resident trust in 2020 in which you were beneficially interested?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Did you have an interest in a foreign corporation in 2020 where the equity percentage held by you together with related persons was equal to or greater than 10%?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you own shares, trust or partnership units in a foreign entity that is not publicly traded on a Canadian or a foreign exchange?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

2020 COVID-19 TAX CHECKLIST

Canada's COVID-19 Economic Response Plan introduced a number of COVID-19 tax relief programs in 2020. Please complete the checklist below to determine which deductions and credits apply to your 2020 personal tax return.

✎ Home Office Expense for Employees. There are 3 options for claiming a home office expense, please check which option applies to you and provide the requested documents for your option:

Temporary Flat Rate Method:

Employees are eligible if you worked from home in 2020 due to the COVID-19 pandemic. You will receive a deduction equal to \$2 per day that you worked from home up to \$400 (200 days).

You are not required to keep any documents to support this claim. If you select this claim, please provide the following:

- Days worked from home in 2020

Detailed Method:

Employees who worked from home in 2020 due to the COVID-19 pandemic can claim the actual amounts paid, which must be supported by documents. This will likely be a larger deduction than the Temporary Flat Rate Method above, but will require more information.

If you select this claim, please provide the following:

- Signed form T2200S or T2200 from your employer on the conditions of employment
- Square footage of your office space
- Square footage of your home
- Summary of expenses such as:
 - Rent
 - Property taxes
 - Home insurance
 - Minor repairs and maintenance
 - Utilities (electricity, heat, water)
 - A reasonable amount spent on home internet
 - Office supplies
 - Cell phone

Self Employed or Incorporated:

Individuals who are self employed or incorporated may continue to claim home office expenses as a business expense. See the 2020 T1 Checklist for information to provide.

✎ Canada Emergency Response Benefit (CERB), Canada Emergency Student Benefit (CESB), Canada Emergency Benefit Account Loan (CEBA), Canada Emergency Wage Subsidy (CEWS), and Canada Emergency Rent Subsidy (CERS) were all offered in 2020. Please check all benefits received in the year individually or through your self-employed business account (do not check if the benefit was received through an incorporated entity):

- CERB, CESB – CRA will provide you with a T4A or T4E for any taxable portion
- CEBA – indicate the amounts and dates received:
 - \$40,000 loan received in 2020
 - \$20,000 loan top-up received in 2020
- Canada Emergency Wage Subsidy – provide a list of payments and dates received
- Canada Emergency Rent Subsidy – provide a list of payments and dates received