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PERSONAL TAX CHECKLIST

As a new tax season approaches, we have compiled a list of what to bring along when you come to file your tax return. We ask that you please wait until you have **all** your tax slips before making an appointment.

ALL INFORMATION SLIPS

- T4 (employment income)
- T4RIF (RRIF withdrawal)
- T4RSP (RRSP withdrawal)
- T4PS (profit share)
- T2202 (tuition fees). If you or a dependent paid for post-secondary education please bring in the T2202 from the college or university.
- To avoid a 20% penalty from CRA on gross unreported income, please bring in all your T4s and income slips. If you receive a slip after filing, bring it to us and we will adjust your tax return.
- T3 (investment income)
- T5 (investment income)
- T4A (miscellaneous, CERB)
- T4E (EI benefits)
- T5018 (sub-contractors)
- T4A(OAS) (Old Age Security)
- T4A(P) (Canada Pension)
- T5007 (WCB / AB Seniors)
- all corresponding provincial slips
- any other slips you have received

DETAILS OF OTHER INCOME

- **Employment income** that is not on T4 slips
- **Business and farming income**
- **Partnership income**
- **Rental income**, including all amounts received from the sharing economy, such as AirBnB, Uber, etc.
- **Interest income** that is not on T5 slips
- **Tips** earned
- **Internet business activities** and web address
- **Co-op equity statement** (both equity statement and T4A needed)

DETAILS OF OTHER EXPENSES

- **Employment related expenses.** You must provide signed form T2200 supplied by your employer.
- **Tools acquired** by apprentice mechanics or other tradespeople
- **Interest on money borrowed** to purchase investments or earn income (RRSP loans do not qualify)
- **Moving expenses**, if you moved more than 40kms closer to work and had or will have income after the move
- **Union or professional dues** paid that do not appear on your T4 slip
- **Interest on student loans** (only provincial or Canada student loans qualify)
- **Child care expenses** paid, only if incurred when you went to work
- **Adoption related expenses**
- **Clergy residence deduction** information, including a signed form T1223
- **Disability supports expenses**
- **Home Accessibility Tax Credit.** If you are over 65 years of age or claim the Disability Tax Credit you can claim certain renovation costs to improve mobility or reduce risk of harm.
- **Educator School Supply Tax Credit** for licensed teachers. Bring in receipts for eligible school supplies (up to \$1000) you purchased for use in the classroom. Please bring a letter of certification from your employer saying you bought the supplies for use in the classroom.
- **Home office expenses.** If you worked from home 50% or more of the time over a 4 consecutive week period you may be eligible to claim home office expenses.
- **New home purchase.** Did you purchase a home in 2020? There is a 1st time home buyer's tax credit (please bring legal/lawyer documentation of the purchase). (**Note** - if you paid GST on your purchase or build, you may also be eligible to receive some of your GST back. Please contact our office and ask about the New Housing GST Rebate.)



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OTHER INFORMATION

- **Northern Residence and Northern Travel** proof (must be brought in at the time of your appointment!). You must have a T4 slip with travel benefits showing as Box 32 to qualify for travel claims.
 - Provide utility bills, rent receipts, or property tax bills as proof of residency. If you're using utility bills or rent receipts, bring one each from January 2020 and December 2020 to prove the full year of residency.
 - Provide receipts for fuel, hotels, campground fees, parking fees, and meals for travel. Credit card or bank statements are also acceptable (if they show the city of purchase).
 - Children in the household claiming a portion of the northern residence or travel need a letter signed by a parent and a copy of utility bills, rent receipts, or property tax bill in the parents' names. A form letter can be picked up at our office prior to your appointment.
- **Medical expenses**
 - Provide all receipts for prescriptions, glasses, eye exams, dental expenses, ambulance, Blue Cross or similar plan premiums, travel for medical reasons (if travel was required due to the service not being available locally), etc. For a complete list go to www.canada.ca/en/revenue-agency/services/tax/individuals/topics/about-your-tax-return/tax-return/completing-a-tax-return/deductions-credits-expenses/lines-330-331-eligible-medical-expenses-you-claim-on-your-tax-return.html.
 - A doctor's letter must accompany any claims for medical travel (form letters are available at our office) and must state you were required to travel due to the service not being available locally. If you required someone to travel with you, the doctor's letter also needs to state this.
- **Sale of home.** If you sold a home in 2020, CRA requires you to report this on your tax return. Please bring along the following information: year you originally purchased your home, street address or land location, and the selling price.
- **RRSP investment purchase** receipts. If you contribute monthly, remember that the January and February 2021 receipts need to be brought in as well (but may only be received sometime in March). If the January and February 2020 contributions were not claimed on your 2019 return, please make sure you bring them now.
- **Foreign property.** Provide details of foreign property owned at any time in 2020 including cash, stocks, trusts, real estate, etc. if the value/cost is over \$100,000 CAD.
- **Disability Tax Credit.** Do you or a family member qualify for the disability credit? Certain diseases such as, but not limited to, diabetes, cystic fibrosis, kidney dialysis, down syndrome, etc. may qualify for substantial tax benefits. Conditions such as blindness, confinement to wheelchair, and mental disabilities also qualify. Pick up a form T2201 at our office and have a doctor complete it to determine if an individual qualifies. Be aware that application can be a lengthy process and the tax credit can only be claimed once approved.
- **Charity donation** receipts (if to a church, must be a registered charity). Donations made personally may have a larger benefit than those made by your corporation. Even small donations to registered charities can have a significant benefit. Donations to U.S. charities do not qualify unless you have U.S. income.
- **Political donation / contribution** receipts.
- **Direct deposit** information. Please bring your bank account information if you have not set up direct deposit for your tax refund or if your banking information has changed. You can find this information on your bank statement or a personal cheque.
- **Previous year NOA.** We encourage you to bring in your 2019 Notice of Assessment to ensure proper assessment and to ensure all carry forward items are verified.
- **Spouse's return.** If we are not preparing your spouse or common-law partner's personal tax return, please provide their return for review and tax planning.

This list covers most of the information you need to bring in, but please bring in anything not covered here if you believe that you need to report it on your tax return. We would be happy to go over it with you.

Visit CRA's website for more details on any of these items –
www.canada.ca/en/services/taxes/income-tax/personal-income-tax.html.

Please call us at (780) 928 3277 to book an appointment. We look forward to seeing you!