

2021 Tax Checklist

Your information

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<hr/>	<hr/>
(H) Phone	(B) or Cell Phone
<hr/>	<hr/>
Marital status	Citizenship , other than Cdn.
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Email address(es)	

Family Information (if not provided in previous years)

Name	SIN	Birthdate	Relationship
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Deliver completed tax returns by: ☐ Email (via ShareFile)
☐ Paper (extra charge of \$20 per return)

SLIPS AND RECEIPTS PROVIDED:

- ☐ T4, T5, T3, T4A, T4E
 - ☐ T3 slips still to come - will be provided once received
 - ☐ T4OAS, T4P (CPP)
 - ☐ T4RSP, T4RIF (RSP / RIF withdrawals)
 - ☐ Partnership income (T5013)
 - ☐ RRSP contributions
 - ☐ Union / Professional dues
 - ☐ Charitable / Political donations receipts
 - ☐ Professional fees invoices (other than mine)
 - ☐ Investment counsel fees
 - ☐ Tuition receipts (T2202A)
 - ☐ Medical / Dental and Disability expenses
 - ☐ Child care (including name and S.I.N. of provider)
 - ☐ Alimony / Maintenance payments (if deductible)
 - ☐ Moving expenses summary

CAPITAL GAINS/LOSSES:

Share dispositions in 2021

- ☐ “Capital Gain and Loss Report” from your broker
Without the above report, I will need the original
purchase price of any shares which were sold in 2021.
- ☐ Selling expenses (i.e., broker’s commission)

Other capital property disposed of in 2021

- ☐ A brief description of property
- ☐ Details of real estate sales and purchases
- ☐ Gross proceeds of sale and date of sale
- ☐ Original cost and date acquired

PROVIDE THE FOLLOWING WHERE APPLICABLE:

- ☐ Self-employed / Business summary
 - ☐ Rental summary
 - ☐ Deductible employment expenses (Form T2200 required)
 - ☐ Temporary Home Office claim (Form on website)

MANDATORY QUESTIONS:

- ☐ Yes ☐ No Do you authorize your name, address, date of birth and email to be provided to Elections Canada?
☐ Yes ☐ No Did you hold foreign property at any time in 2021, with a total cost of more than \$100,000 Cdn.? If yes, please provide details. *(This excludes personal use vacation properties)*
 Yes ☐ No ☐ Did you sell your principal residence in 2021?
Please do not forget to sign and submit 2021 engagement letter (from website)