

Name(s) \_\_\_\_\_

Return by email or drop off or review at phone appointment

Phone (s) \_\_\_\_\_

## Ste Anne Tax Service 2020 Tax Information Checklist

Please choose the Package that fits you best: **Any information changed? (if yes, see reverse)**

- Worry Free Package**
- Optimization Package**
- Basic Package**

- Name, Address, Mailing Address, Phone (1,5,6)
- Added Dependents (2)
- Marital Status changed (3)
- Banking Changed (4)

**If Yes to any of the below, see reverse**

- Did you sell or dispose a home or property in 2020 including your Principal Residence (5,6)
- Did you own Foreign Property or Investments for a cost of more than \$100,000 (7)
- Did you financially support a disabled family member (8)

### Slips used to prepare tax returns

(we can access most from CRA)

- T3 Investment
- T4 Employment
- T4 OAS
- T4 CPP
- T4A Pension / Coop
- T4 RRIF
- T4 RRSP
- T4 Employment Insurance
- T4PS Profit Sharing Plan
- T5 Interest / Investment
- T5007 WCB / EIA
- T5008 Sale of Securities
- T5018 Sub Contract Payment
- RRSP Receipts Mar – Dec 2020
- RRSP Receipts Jan 1 – Mar 1 2021

### Other Income Sources (## see reverse)

- CCB; not taxable, no tax slip issued
- Tips (keep a tip log)
- Child / Spousal Support received
- Foreign Pension Income
- Sale of Investments (13)
- Rental property (15)
- Self Employed (16)
- Social Media / Gaming (17)
- Dispose of vacant land / cottage (18)

### Receipts for Deductions (## see reverse)

- Union Dues or Professional Fees
- Child Care receipt (9)
- Moving expenses (new job or accessibility)
- Investment expenses (14)
- Child / Spousal Support paid
- T2200 & T777 Employment expenses
- Trucker's meal logs (20)

### Receipts for Credits (## see reverse)

- Rent Paid (shared with other than spouse?)
- Property Tax Bill (10)
- Charity Donations / Political Contributions
- Medical: pharmacy yearly lists, health plan annual print-out, dental, eyewear, travel log, travel health insurance, chiropractor, incontinence pads (11)
- Health premiums (12)
- Child fitness / sports /arts (MB credits <16 or 16-24)
- Student loan interest; Canada/Manitoba only
- T2202 Tuition Receipt
- Reno expenses for improved accessibility
- Educator School Supply Tax Credit
- Digital Subscription Tax Credit (*new*)

### COVID-19 Specific items (## see reverse)

- Working at Home Due to COVID-19 (19)
- MB Senior Economic Recovery Credit \$200 (21)
- T4A CERB, CESB, CRB, CRSB, CRCB
- T4A MB Benefits (Risk, Job restart, Caregiver)

*(Do not bring us any prior year tax info unless we ask)*

## **2020 Tax Checklist; more details if yes to some of the questions:**

- 1) Name: marriage certificate or legal name change certificate
- 2) Added Dependents: name, gender, birthdate
- 3) Marital Status: ask us for detailed questionnaire
- 4) Banking: provide void cheque or banking info from on-line banking
- 5) Moved: Old home: residential & mailing address, rent or lawyer docs; New home: residential & mailing address, rent or lawyer docs; new home buyer; ask us for detailed questionnaire
- 6) Sell Principal Residence: what year purchased? Selling price? Joint? (If you owned other property like a cottage for any years at the same time, we need more info)
- 7) Own foreign property or investment cost more than \$100,000: provide details
- 8) Do you financially support a disabled family member; ask us for detailed questionnaire
- 9) Child Care Receipts: if individual provided service need full name and SIN on receipt
- 10) Property Tax Bill: need bill (not just receipt) if under 65 and did not get \$700 credit; if over 65 and combined income under \$63,000, need bill (not just receipt) for Senior School Tax Rebate
- 11) Medical expenses: ask for a medical travel log, look at Awesome Tax Tips; review CRA medical expenses; or ask us if not sure!
- 12) Health Care Premiums: T4 employment box 85 or year-end pay statement showing employee's portion paid or letter from employer; or T4A pension box 135; or thru bank account: get receipt from Blue Cross or others
- 13) Sale of Investments capital gains/losses; need statement: gains and losses or T5008
- 14) Investment Fees: only if paid out of pocket, cannot claim if deducted from mutual funds; interest on investment loan
- 15) Rental property: ask us for Statement of Rental Property to provide details
- 16) Self Employed: ask us for Statement of Business Activities to provide details
- 17) Social Media Influencers and Video Game Streamers must claim paid endorsements
- 18) Sale of vacant land / cottage: call us so we can request all details
- 19) Working at Home Due to COVID-19: request detailed worksheet & information
- 20) Trucker's meal logs: provide logs or calculate for the year (refer to CRA's guidelines)
- 21) MB Seniors Economic Recovery Credit, \$200 paid by cheque May/June 2020; if you are 65+ and did not receive, let us know so we can include it on your tax return. Your 2018 tax return address was used so you may not have received the payment if you changed mailing address between Spring 2019 and Summer 2020.