

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

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

Email(s) \_\_\_\_\_

*Return by email or TaxFolder or drop off*

## STE ANNE TAX SERVICE

### 2021 TAX INFORMATION CHECKLIST

Please choose the Package that fits you best:

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

**Any information changed? (if yes, see reverse)**

- Name, Address, Mailing Address, Phone (1,5,6)
- Added Dependants (2)
- Marital Status changed (3)
- Banking Confirmed / Changed (4,21)

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

- Did you sell or dispose of a home or property in 2021 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 / OAS \$500 (75+)
- T4 RRIF
- T4 RRSP
- T4 Employment Insurance
- T4PS Profit Sharing Plan
- T5 Interest / Investment
- T5007 WCB / EIA
- T5008 Sale of Securities
- T5018 Subcontract Payment
- RRSP Receipts Mar – Dec 2021
- RRSP Receipts Jan 1 – Mar 1 2022

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

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

#### 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)
- T4A CRB, CESB, CRB, CRSB, CRCB, CWLB
- Repayment of CRB etc

## **2021 Tax Checklist; more details if yes to some of the questions:**

- 1) Name: marriage certificate or legal name change certificate
- 2) Added Dependents: name, 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 that cost more than \$100,000 (including cryptocurrency): 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: if under 65 and did not get \$525 credit or if over 65 and combined income under \$63,000 (for Senior School Tax Rebate); we need the bill (not just receipt)
- 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: similar to last year, increased to max 250 days
- 20) Trucker's meal logs: provide logs or calculate for the year (refer to CRA's guidelines)
- 21) Banking info: Confirm your banking info with CRA My Account. If you do not normally get a refund, provide us with your banking info so we can update CRA's info; we do not have access to view your current banking info with CRA. Both spouses should provide banking info, CRA will pay the Climate Action Incentive to the spouse they process first.

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

*SteAnneTaxService.ca*