WILLIAMSON Accounting Services

2020 Personal Income Tax Return Checklist

PERSONAL INFORMATION (If we prepared your 2019 return, please complete ONLY if there is a change)					
Name	**SIN**	**Date of Birth (yyyy/mm/dd)**	**Phone (H)**	**Cell Phone**	**Phone (W)**
Fill in for your Spouse, if applicable					

Address				**Postal Code**	
Email					
Marital Status	□ Married	□ Single	□ Common Law	□ Separated	□ Divorced	□ Widowed
If marital status changed during the year, provide date			(yyyy/mm/dd)		Spouse's net income	$
Are you a Canadian resident ☐ Yes ☐ No			**Canadian citizen ☐ Yes ☐ No ☐ N/A**		Entry into Canada (yyyy/mm/dd)	
Do you own foreign assets with a cost greater than $100,000				**☐ Yes ☐ No**	Completed T1135	**☐ Yes ☐ No**
Did you dispose of a property (or properties) in 2020 for which you are claiming a principal residence exemption ?						**☐ Yes ☐ No**

Dependents Name:	DOB:	Relationship:
Name:	DOB:	Relationship:
Name:	DOB:	Relationship:
	Do you pay back Home Buyers Plan or LLP?	**☐ Yes ☐ No**

Income and Expense details – make sure you count all the slips to avoid any penalties* and interest* imposed by CRA. A copy of this checklist is required for each person.

Income Slips	No. of slips	Income Slips	No. of slips	Deductions/Credits D/C	Deductions/Credits No. of slips	Deductions/Credits D/C	Deductions/Credits No. of slips
T4		Support Payment		Accounting Fees		Medical expense	
T3		Home buyer/LLP		Arts/fitness for kids *DISCONTINUED*		Moving Expense	
T5		Foreign Income		Alimony paid		Pension amount	
T4A		US Social Security		Adoption expenses		**RRSP contribution receipts**	
T4AP CPP		Stocks & Bonds C		Childcare expense		Student Loan Interest	
T4A-OAS		Buy & Sell real-estate		Caregiver		Tuition fee / T2202	
T4RSP		Rental income B		Capital loss		Transit passes Discontinued	
T4E		Self-employed A		Disability Tax Credits / T2201		Union Dues	
T4-RIF		Commission income A		Donation receipts		Tax paid in installment	
RC62		Farming income A		Disability support deduction		**Last year's NOA**	
T5007		Fishing income A		Employment expenses		Other deductions	
T5018		Other income		First time home buyer		1.	
T5013		1.		Interest on investment		2.	
T5008		2.		Legal Fees		3.	
T4 PS		3.				4.	

NOTE: A & B – Please use self-employment and rental income checklist on our website C – provide capital gain realization report *See disclaimer.

Did you pay property taxes? Total property taxes paid _____ Municipality _____

Did you pay rent? Total rent paid _____

Have you previously signed a T1013 form to authorize Williamson Accounting as a personal representation with CRA? **Yes - No** (This is required)