

2020 Personal Income Tax Checklist

<input type="checkbox"/>	COVID Emergency or Recovery Benefits Repayment
<input type="checkbox"/>	Other employment expenses (Work from home >50% during COVID)
<input type="checkbox"/>	Changes to mailing address and contact information
<input type="checkbox"/>	Details on sale of principal residence
<input type="checkbox"/>	Canada Revenue Agency correspondence

Slips

<input type="checkbox"/>	T4 slips (Employment income)
<input type="checkbox"/>	COVID Emergency or Recovery Benefits (CERB, CESB, CRB, CRBS, CRCB) (T4A or T4E)
<input type="checkbox"/>	Employment insurance benefits (T4E)
<input type="checkbox"/>	Interest, dividends, mutual funds (T3, T5, T5008, T5013)
<input type="checkbox"/>	Tuition / education receipts (T2202A)
<input type="checkbox"/>	Universal Child Care Benefit (RC62)
<input type="checkbox"/>	Old Age Security and CPP benefits (T4A-OAS, T4AP)
<input type="checkbox"/>	Other pensions and annuities (T4A)
<input type="checkbox"/>	Social assistance payments (T5007)
<input type="checkbox"/>	Workers' compensation benefits (T5007)
<input type="checkbox"/>	All other information slips (T4RSP, T4RRIF)
<input type="checkbox"/>	Foreign Income
<input type="checkbox"/>	US Income Slips (1099-INT & DIV, SSA-1099, PEN-1099-R)
<input type="checkbox"/>	US Foreign Bank Account & Reporting (FBAR)
<input type="checkbox"/>	Closer Connection Exception (IRS-8840)

Receipts (Please Summarize)

<input type="checkbox"/>	RRSP contribution receipts
<input type="checkbox"/>	Support for a child, spouse or common-law partner
<input type="checkbox"/>	Professional or union dues
<input type="checkbox"/>	Medical expenses
<input type="checkbox"/>	Tuition for Self or Dependent Children
<input type="checkbox"/>	Senior transit pass receipts for 2018 (Over 65) Maximum \$3000
<input type="checkbox"/>	Charitable donations
<input type="checkbox"/>	Political contributions
<input type="checkbox"/>	Child care expenses
<input type="checkbox"/>	Adoption expenses
<input type="checkbox"/>	Moving expenses
<input type="checkbox"/>	Interest paid on student loans
<input type="checkbox"/>	Employment expenses
<input type="checkbox"/>	Office - in-home expenses
<input type="checkbox"/>	Exams for professional certification
<input type="checkbox"/>	Eligible educator school supplies
<input type="checkbox"/>	Digital news subscription expense with a qualified Canadian journalism organization

Investments

<input type="checkbox"/>	Broker statements, statements of capital gains and losses
<input type="checkbox"/>	Investment counsel fees
<input type="checkbox"/>	Interest on money borrowed to purchase investments
<input type="checkbox"/>	Sale of other investments (i.e. real estate)
<input type="checkbox"/>	T1135 Foreign Reporting Documentation

Other documentation

<input type="checkbox"/>	Rental income and expense summary
<input type="checkbox"/>	Business income and expense summary
<input type="checkbox"/>	Automobile / Travel logbook and expenses
<input type="checkbox"/>	Disability Tax Credit Certificate (T2201)
<input type="checkbox"/>	Caregiver amount supporting a relative or child with disability
<input type="checkbox"/>	Declaration of Conditions of Employment (T2200)
<input type="checkbox"/>	Custody Arrangement documentation
<input type="checkbox"/>	Property taxes and rent paid
<input type="checkbox"/>	Amount for eligible dependant
<input type="checkbox"/>	Home accessibility
<input type="checkbox"/>	First time home buyer