

Please complete all sections where there have been changes **PLUS** all mandatory (*) fields.

TAXPAYER'S INFORMATION

*Name: _____ Date of Birth: _____

 YYYY/MM/DD

SIN: _____

*Marital Status: _____

*Did your status change in 2020 Y N Date of Change: _____

 YYYY/MM/DD

Are you a US Citizen Y N

SPOUSE'S INFORMATION

Name: _____ Date of Birth: _____

 YYYY/MM/DD

SIN: _____

Net Income (if filing separately): \$ _____

DEPENDANT'S INFORMATION

Name: _____ M F Date of Birth: _____

 YYYY/MM/DD

Name: _____ M F Date of Birth: _____

 YYYY/MM/DD

Name: _____ M F Date of Birth: _____

 YYYY/MM/DD

CONTACT INFORMATION

Address: _____ *Phone / Cell: _____

 Work: _____

City / Province: _____ *Email: _____

Postal Code: _____ Spouse's Email: _____

 Please complete all questions in the following sections.

*PRINCIPAL RESIDENCE

Did you sell your principal residence during the year? Y N

IF YES Sale Price: \$ _____

Year of Purchase: _____

Has there been any change in the use of your principal residence? (ie. Rental) Y N

*OTHER INFO

Did you own foreign property at any time during the year that was worth more than \$100,000, including investments? Y N

Rental Income: Y N
(attach statement of rental income)

Self Employed: Y N
(attach statement of business income)

*TAX CREDITS / DEDUCTIONS

Charitable Donations: Y N

Child Care Expenses: Y N

Employment Expenses: Y N
(needs signed T2200 – attach automobile and home office schedules)

Medical and Dental Expenses: Y N

Membership Dues: Y N

RRSP Contributions: Y N

Tuition Fees: Y N

Do you claim the disability amount? Y N

If yes, is this the first year that it is being claimed? Y N

Property Taxes / Rent Paid: \$ _____

Tax Paid by installments: \$ _____

*QUESTIONS TO ANSWER

Y N

1. Did you receive **interest, dividends**, or **benefits** from a business in which a relative is a key party (in terms of ownership or involvement)?

2. Are you **or any of your dependants disabled**? If so, provide Form T2201, Disability Tax Credit Certificate.

The **transfer rules** allow claims for certain dependent relatives. In addition, are you, or would you like to provide support to a disabled person? Tax planning opportunities may be available, such as the establishment of a Registered Disability Savings Plan. Persons with **disabilities** may also receive tax relief for the cost of **disability supports** (e.g. sign language services, talking textbooks, etc.) incurred for the purpose of **employment** or **education**. If you or your dependants are disabled but do not have a T2201 Form, please provide details so we can explore whether you are eligible for special credits or benefits.

3. Are you the **caregiver** for any infirm family members? Did you provide **in-home care** for an infirm **dependent relative**?

4. Did you provided **in-home care** for a **parent or grandparent** (including in-laws) 65 years of age or over, or an infirm dependent relative? A federal tax credit may be available. Certain provincial credits may also be available. Also, the caregiver may claim related **training costs** as a medical expense credit.

5. Do you want your **tax refund** deposited directly into your account at a financial institution?



Y N

6. If you have children up to the age of 17, have you received Canada Child Benefit (CCB)?
7. Did you purchase a new home in 2020? If so, you may be eligible for the new **residential property GST/HST rebate**. Also, are you a first-time **home buyer** in 2020? A federal tax credit based on \$5,000 (@15% = \$750) may be available.
8. Are you a **U.S. citizen, Green Card Holder**, or were you, or your parents **born in the United States**? You may have U.S. filing obligations.
9. Did you incur costs to access **medical intervention** required in order to **conceive a child** which was not previously allowed as a medical expense? Amounts may be claimed in respect of any such expense for the previous 10 years (if amounts were incurred in 2010, a claim must be made by the end of 2020).
10. Have you spent more than 200 hours acting as a **volunteer firefighter** or a **search and rescue volunteer**? You may be eligible for a federal tax credit.
11. Are you an **aboriginal person**? Special tax rules may apply.
12. Do you authorize CRA to give your name, address, date of birth, and citizenship to **Elections Canada** to update the National Register of Electors?
13. Have you made any contributions to a **gifting tax shelter**?
14. Did you receive any **significant prizes or awards** from your, or a related person's place of employment?
15. Did you receive a retroactive **lump-sum payment** over \$3,000 (for example, spousal support)? In certain cases, some tax relief may be available.
16. Have you organized or managed a **crowdfunding campaign**? In some cases, there are tax implications.
17. **Other provincial and territorial tax credits** may be available in your jurisdiction such as certain property taxes and residential rent paid in Ontario.
18. **Do you have a will? When was it last updated?** _____