

2020 Tax Information Checklist

Contact information (note any updates)

Family information

- Has your marital status changed? Yes No
- Are there any changes to your dependants? Yes No
(provide SIN, name and birth date)

Questions required for electronic filing

- Are you a Canadian Citizen? Yes No
- Do you agree to Canada Revenue Agency providing your name, address, and date of birth to Elections Canada for the National Register of Electors? Yes No

Principal residence reporting

Complete address of the home sold (including postal code): _____ Year purchased _____
Sale price _____

Supporting documents

Slips used to prepare last year's return:

- Notice(s) of (re)assessment for 2019

Other/new income sources

- First year for CPP, OAS?
- T4E for employment insurance payments
- Alimony and/or maintenance received
- Rental property revenue and expenses
- Business, self-employed income and expenses

Receipts

- RRSP contributions and withdrawal
- Union or professional dues
- Donations
- Medical expenses, including plan premiums
- Child care
- Student loan interest
- T2202 tuition fees
- Moving expenses
- T2200 Employment expenses
- Investment expenses (interest, mgmt. fees)
- Alimony and/or maintenance paid

Tax on split income requirement

Did you receive any of the following types of income from a private business, activity or profession where a related person who is resident in Canada has a significant interest or is actively involved:

1. Dividends or shareholder benefits from a private corporation Yes No
2. Partnership or Trust income from a related business Yes No
3. Rental income (including through a trust or partnership) where a related person is involved Yes No
4. Interest on loans to a private corporation, partnership or trust Yes No
5. Income or gains from the disposition of private shares or other property Yes No

Please return supporting documents and completed form to: Dayani Castro Group Corp., 605-111 Catherine St, Ottawa, ON K2P0P4 or dayani@dcastro.ca

2020 T1 Foreign Property Reporting

Canadian resident individuals who held certain property outside Canada with a total cost of more than \$100,000 CAD at any time during the tax year are subject to certain disclosure requirement to the Canada Revenue Agency (CRA).

Non-compliance with this reporting requirement results in severe penalties. To help us determine whether you are subject to the reporting rule, please read and consider each of the following questions carefully when answering them.

If you owned any of the following property at any time during 2020, answer YES to the relevant questions. You may be subject to the foreign property reporting rule, and we may prepare additional forms to submit to the CRA.

1. Funds or intangible property (patents, copyrights, etc.) situated, deposited or held outside Canada Yes No
2. Tangible property situated outside of Canada Yes No
3. A share of the capital stock of a non-resident corporation held by the taxpayer or by an agent on behalf of the taxpayer Yes No
4. An interest in a non-resident trust that was acquired for consideration, other than an interest in a non-resident trust that is a foreign affiliate for the purposes of section 233.4 Yes No
5. An interest in a partnership that holds a Specified Foreign Property unless the partnership is required to file a T1135 Yes No
6. An interest in, or right with respect to, an entity that is a non-resident Yes No
7. A property that is convertible into, exchangeable for, or confers a right to acquire a property that is Specified Foreign Property Yes No
8. A debt owed by a non-resident, including government and corporate bonds, debentures, mortgages, and notes receivable Yes No
9. An interest in a foreign insurance policy Yes No
10. Precious metals, gold certificates, and futures contracts held outside Canada Yes No

Signature: _____

Date: _____

Signing date

Please return completed form to: Dayani Castro Group Corp., 605-111 Catherine St, Ottawa, ON K2P0P4 or dayani@dcastro.ca