

Tax Information Checklist 2021



Principal residence sale reporting*

- Complete address of the home sold (including postal code)
- Year purchased
- Purchase price
- Sale price

Slips to provide*

- T4 - Employment Income
- T3 – Statement of Trust Income
- T4A - Pension/Annuity/Other income
- T4A (OAS) - Old Age Security income
- T4A (P) - Canada Pension Plan
- T4E - EI Benefits
- T4RSP - Proceeds from RRSP
- T5 – Bank Interest or Taxable Dividends
- T10 – Pension Adjustment Reversal (PAR)
- T101 – Resource Expenses
- T600 – Bond Interest Coupons
- T5003 – Statements of Tax Shelter Information
- T5007 – Statements of Benefits
- T5008 – Investment Income
- T5013 – Statement of Partnership Income
- T5018 – Statement of Contract Payment
- T2200 - Declaration of Condition of Employment
- T2201 – Disability Tax Credit Certificate
- T2202 – Education Amount Certificate
- T1204 – Government Service Contract Payment
- TL11A to T111D – Tuition & Education Certificate
- Other Income Slips

Contact information

- Email
- Cellphone number
- Social insurance number
- Date of birth
- Current address

Family information

- Has your marital status changed?
- Your spouse's full name, Email & cellphone number
- Social insurance number and date of birth
- Are we preparing a 2021 tax return for your spouse?
- Are there any changes to your dependants?

Supporting documents

- Notice(s) of (re)assessment for 2020 (We need this for any pertinent carry forward information)
- Did you own/hold foreign assets/property with a cost of more than \$100,000 CAD?
- Are you a Canadian Citizen?

Receipts*

- RRSP contributions and withdrawal
- Union or professional dues
- Medical expenses, including plan premiums
- Child care
- Student loan interest
- T2202 Tuition fees for spouse/dependent children
- Moving expenses
- T2200 Employment expenses
- Investment expenses (interest, mgmt. fees)
- Alimony and/or maintenance paid
- Rent or Property Tax paid
- Investment loan interest (no RRSP)
- Other

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

* (if applicable)

SELF-Employee & Rental Income Information*

- Income
- Expenses
- Business use assets information for depreciation
- Home-Office information (expenses and square footage)

Business use of Vehicle*

- Total mileage – Jan 2021-Dec 2021
- Business mileage for the year
- Expenses (gas, repairs, parking, interest, licenses, insurance, etc.)

Tax on split income requirement*

Did you receive any of the following types of income from a private income?

- 1. Dividends or Shareholder benefits from a private corporation
- 2. Partnership or Trust Income from a related business
- 3. Rental income (including through a trust or partnership) where a related person is involved
- 4. Interest on loans to a private corporation, partnership or trust
- 5. Income or gains from the disposition of private shares or other property