

## Personal Income Tax Checklist 2021 Taxation year

### PERSONAL INFORMATION (If we prepared your 2020 return, please complete ONLY if there is a change)

Taxpayer Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

SIN: \_\_\_\_\_ SIN: \_\_\_\_\_

Date of Birth: (DD/MM/YYYY) \_\_\_\_\_ Date of Birth: (DD/MM/YYYY) \_\_\_\_\_

Phone (home): \_\_\_\_\_

Phone (Other): \_\_\_\_\_

Email(s) \_\_\_\_\_

Marital status:      Married                  Single                  Common-law          Separated              Divorced              Widowed

If marital status changed during the year, provide date of change (DD-MM-YY): \_\_\_\_\_ Nature of change \_\_\_\_\_

Did the marital status change made you move out from your Principal Residence (PR)?      Yes                  No

### DEPENDANTS (If we prepared your 2020 return, please complete ONLY if there is a change)

Name	Birth Date (dd/mm/yyyy)	SIN	Relationship

### RESIDENCE (If we prepared your 2020 return, please complete ONLY if there is a change)

Province or territory of residence on December 31, 2021 \_\_\_\_\_

### FOREIGN REPORTING (PENALTIES APPLICABLE if not reported)

• Do you own/hold foreign Property / assets at any point of time in 2021 or before outside your RRSP (other than personal use assets) with a cost of more than CDN \$250,000?      Yes                  No

Or

• Between CDN \$100,000 and CDN \$250,000      Yes                  No

• Foreign affiliates (controlled or non-controlled)      Yes                  No

Please provide details of ownership of foreign assets and transactions with foreign entities

• Did you inherit any property/money or any kind of asset which is worth \$100,000 at any point of time in 2021?      Yes                  No

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*PLB TAX, Chartered Professional Accountant*

| Unit 216, 6678 152 street, Surrey, BC V3S 7J2 | T. 604.581.1000 | F. 604.930.9960 | E. [pradeep@plbtax.com](mailto:pradeep@plbtax.com) |

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### HOME/ PRINCIPAL RESIDENCE (Buy or Sell)

- |  |     |    |
|--|-----|----|
| • <b>Did you dispose of/ Sell your principal residence during the year?</b> Please Provide details of and/or documents for purchase and sale. <b>If yes,</b> | Yes | No |
| • Did you rent a significant portion of your principal residence ?   | Yes | No |
| • Have you moved out of your Principal residence because a significant portion of the property was damaged by fire?  | Yes | No |
| • Did you change your Principal residence into a rental property?  | Yes | No |
| • Did you buy a Principle Residence?   | Yes | No |

### INCOME

- |  |     |    |
|--|-----|----|
| • T4 slips - Employment income (including stock option benefits)?  | Yes | No |
| • T4A - Commission and self-employment (including directors fees, scholarships, bursaries)?  | Yes | No |
| • T4E - Employment insurance?  | Yes | No |
| • T5007 - Social Assistance or Workers' Compensation?  | Yes | No |
| • Income not included on T4 (tips, gratuities and occasional earnings etc)? \$ _____   |     |    |
| • T4A - Pension, retirement and annuity income?  | Yes | No |
| • T4A(OAS) - Old age security?   | Yes | No |
| • T4RSP - Registered retirement savings plan income (including withdrawals)?   | Yes | No |
| • T4AP - Canada pension?   | Yes | No |
| • T4A(RCA) - Retirement compensation arrangements?   | Yes | No |
| • T4RIF - Registered retirement income fund income?  | Yes | No |
| • Foreign pension income? Attach details of amounts received   | Yes | No |
| • Other Foreign Income   | Yes | No |
| • T3 - Income from trust allocations?  | Yes | No |
| • T5 - Investment Income (dividends, interest, including interest earned but not yet received, for example, Canada Savings Bonds)? | Yes | No |
| • T4PS - Income from profit sharing plans?   | Yes | No |
| • T5013/T5013A - Partnership income?   | Yes | No |
| • T5008 - Income from Securities transactions?   | Yes | No |
| • Other investment income, for example labour sponsored funds?   | Yes | No |
| • Shares acquired and/or disposed of through exercise of stock options? Please provide details                                     | Yes | No |
| • Did you dispose of property during the year (publicly traded shares, bonds, real estate, etc.)?                                  | Yes | No |
| • Support payments received? (spousal support and/or child support)  | Yes | No |
| • RRSP Withdrawal: Income or Home buyers plan or Lifelong learning?  | Yes | No |

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## Personal Income Tax Checklist 2021 Taxation year

**OTHER INCOME** – Details of any of the below income where no T slips may have been received:

- Other employment income (including stock options and Election Form T1212)
- Rental income. Also provide the details of relevant expenses **any COVID-19 rental support received**
- Alimony, separation allowances or child maintenance
- Pension income from foreign source

### DEDUCTIONS

- Disability support deduction?
- Childcare expenses? Please provide receipts for each child Yes      No
- Professional or Union dues paid? (not included on T4) \$ \_\_\_\_\_
- Support payments made? (spousal support and/or child support) Yes      No
- Moving expenses? Please provide details with all receipts Yes      No
- Interest cost on funds borrowed to earn investment income \$ \_\_\_\_\_
- Investment management fees \$ \_\_\_\_\_
- Accounting/Legal Fees \$ \_\_\_\_\_
- **T2200S: Covid – 19 Work from Home Expenses.** (This form is only for employees who worked from their home in 2021 due to COVID-19) Yes      No
- CERB/CRB Repayments – support for any CERB/CRB amounts repaid during 2021. Yes      No

### TAX CREDITS

- Home renovation Tax credit (65+ and/or disabled) Yes      No
- Did you incur any adoption related expenses? Yes      No
- Are you eligible for disability tax credit? Yes      No
- Charitable Donations? Attach receipt Yes      No
  - Donation of cultural property*
  - Donation of ecologically sensitive land*
  - Gifts to foreign Charitable Foundations*
- Political Donations? Attach receipt Yes      No
- Tuition fees for yourself? (Form T2202) Yes      No
- Tuition fees for your dependent(s)? (Form T2202 signed by student) Yes      No
- Interest on student loans? Attach receipt Yes      No
- Trade or professional examination or other professional dues? Attach receipt Yes      No
- Did you complete a minimum of 200 hours of volunteer fire-fighting services in the year, which includes responding to calls, being on call, attending meetings and training related to prevention and suppression of fire? Yes      No

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- |   |     |    |
|---|-----|----|
| • Do you or dependents have prolonged mental & physical impairment or life-sustaining therapy) (Vision, memory, speech, Type 1 Diabetes Kidney Disease etc.)? | Yes | No |
| • Employment expenses (Form T2200 signed by employer), including tools?   | Yes | No |
| • Medical expenses (including travel insurance, Gluten-free products, Medical marihuana and cannabis products for medical purposes etc.)?                     | Yes | No |
| • Canada Caregiver Credit   | Yes | No |
| • Caregiver Training courses  | Yes | No |
| • First-time home buyer tax credit  | Yes | No |
| • Eligible educator school supply tax credit? Claim up to \$1,000 for eligible teaching Supplies  | Yes | No |
| • Canada Training Credit? (Must have eligible tuition fees)   | Yes | No |

### OTHER CREDITS

- |  |     |    |
|--|-----|----|
| • Pension Adjustment Reversals (T10 slip)?   | Yes | No |
| • Mining tax credit expenses or Film and Video production eligible for tax credit? | Yes | No |

### SUB – CONTRACTOR/ PROPRIETORSHIP/ SELF – EMPLOYED

Please fill the income and expense checklist (Ask for one)

- |   |     |    |
|---|-----|----|
| • Financial statements or summary details for business/rental investments attached?             | Yes | No |
| • Details of income and expense items attached?   | Yes | No |
| • Details (including dates) of acquisition and disposals of fixed assets attached?              | Yes | No |
| • Do you use your vehicle for business? Provide expenses; both business and total Kilometers    | Yes | No |
| • Do you use a portion of your home for business?   |     |    |
| • Provide expenses; both workspace and total square footage of home and space used for business | Yes | No |
| • Do you have a Payroll account?  | Yes | No |
| • Do you have a PST account?  | Yes | No |
| • Have you registered to be eligible for Employment Insurance special benefits?                 | Yes | No |

### RENTAL PROPERTIES

Please fill the Rental income and expense checklist (Ask for one)

- |                              |     |    |
|------------------------------|-----|----|
| • Do you have a GST account? | Yes | No |
|------------------------------|-----|----|

If first year of rental, please provide details of the property

### RRSP CONTRIBUTIONS

- |   |     |    |
|---|-----|----|
| • Did you make any RRSP contributions? Attach receipts (including those in the First 60 days of 2022) | Yes | No |
|---|-----|----|

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## Personal Income Tax Checklist 2021 Taxation year

### PRIOR YEAR TAX RETURN INFORMATION/CORRESPONDENCE

- |   |     |    |
|---|-----|----|
| • Notice of (RE)Assessment for 2020 year including RRSP contribution limit?       | Yes | No |
| • Notice of (RE)Assessment(s) for any other year if not already provided to us?   | Yes | No |
| • <b>2021 Income tax instalments paid for the year?</b>                           | Yes | No |
| • Direct Deposit - is your information current? If changed, provide a VOID cheque | Yes | No |

### QUESTIONS (If you don't answer the following, we will assume it as yes)

- |  |     |    |
|--|-----|----|
| • Do you agree to CRA providing your name, address and date of birth to election Canada? | Yes | No |
| • Are you a Canadian Citizen?  | Yes | No |
| • If no, are you a permanent resident?   | Yes | No |

### PERSONAL PREFERENCES

- |   |            |          |
|---|------------|----------|
| • Format desired for the final copy of your personal income tax return(s)                                   | Paper      | Email    |
| • If paper copy requested, indicate if you would like spouses return and family members packaged separately | Separately | Together |

### FILING & PAYMNET DUE DATES FOR 2021 TAXES

- **May 2, 2022:** Deadline to file your taxes.
- **Jun 15, 2022:** Deadline to file your taxes if you or your spouse or common-law partner are self-employed.
- **May 2, 2022:** Deadline to pay your taxes.
- **March 31, 2022:** GST if you have commercial property
- **Jun 15, 2022:** Deadline to file annual GST return.
- **May 2, 2022:** Deadline to pay your GST.

### Our office address is:

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