



Personal Income Tax Return Checklist

22 Hart Court, Huntsville, ON P1H 1T6 Phone: 705-788-7635 Fax: 705-788-7157

NAME: _____

ADDRESS*: _____

HOME PHONE*: _____

D.O.B.* _____

BUS. PHONE*: _____

S.I.N.* _____

MARITAL STATUS*: _____

Email *: _____

SPOUSES NAME*: _____

SPOUSES D.O.B.* _____ SPOUSES S.I.N.* _____

EMAIL ADDRESS: _____

INCOME:

- Employment T4
Pension T4A
Old Age Security T4A (OAS)
Canada Pension T4A (P)
RSP, RRIF, T4RSP/RRIF
UI T4U
Investment/Trust (T3, T5)
UCCB (RC62)
Interest on Canada Savings Bonds
Social Assistance/Workers Comp (T5007)
Bank Interest
Capital Gains
Support Received
Adoption Expenses
Eligible Educator School Supply Credit

RECEIPTS:

- RRSP Contributions
Charitable Donations
Political Contributions
Medical/Dental etc. Expenses
Tuition/Education (T2202)
Disability Certificate/Caregiver
Union Dues and/or Professional Fees
Child Care
Student Loan Interest
Rent or Property Tax (OTB)
Support for Spouse
Declaration Working COVID-19(T2200S)
Employment Expenses (T2200)
Home Accessibility Tax Credit (for Seniors)
Search & Rescue Vol. Amount
Tool Expense (For Apprenticeship)

PROVIDE DETAILS AND/OR A SCHEDULE:

- Dependants: (including S.I.N.)
Income Tax Instalments
Rental Income & Expenses
Self-Employment Income
Self-Employment Expenses

- Spouses' Income**
Last Year's Return/Assessment
Interest Paid
Moving Expenses
Home Office Expenses
Financial Planning Fees
Other

* Tax Free Savings Account Contribution Limit For 2020 is an additional \$6,000.00 *

Did you sell your principle residence? It must be reported on your tax return.

Year of Acquisition _____ Proceeds of Disposition _____

Automatic Calculations: Climate Action Incentive, Low-Income Individuals and families tax credit and Childcare Access and Relief from Expenses tax credit

ADDITIONAL INFORMATION:

* Only required if information is different than previous year

** Not required if spouse has his/her T1 processed by Balancing Muskoka.