

## Client Information Form 2020 Tax Year

This package must be completed in full before our office can start your tax return.

**One package per household.**

<p><b>TAX PAYER 1</b> (Last) _____ (First) _____ SIN _____</p> <p>(Home #) _____ Birth Date yyyy ____ mm ____ dd ____</p> <p>(Work #) _____ Canadian Citizen <b>Y</b> <input type="checkbox"/> or _____</p> <p>(Cell #) _____ May Canada Revenue Agency provide your name, address and SIN to Elections Canada to keep the voters list up to date? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/></p> <p>(Email) _____</p>	
<p><b>MARITAL STATUS</b> <input type="checkbox"/> Married <input type="checkbox"/> Common Law <input type="checkbox"/> Divorced</p> <p>Date of status change in 2020 mm ____ / dd ____ <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Single</p>	
<p><b>TAX PAYER 2 (spouse/partner)</b> (Last) _____ (First) _____ SIN _____</p> <p>(Home #) _____ Birth Date yyyy ____ mm ____ dd ____</p> <p>(Work #) _____ Canadian Citizen <b>Y</b> <input type="checkbox"/> <b>N</b> <input type="checkbox"/></p> <p>(Cell #) _____ May Canada Revenue Agency provide your name, address and SIN to Elections Canada to keep the voters list up to date? <b>Y</b> <input type="checkbox"/> or <b>N</b> <input type="checkbox"/></p> <p>(Email) _____</p>	
<p><b>ADDRESS</b> <input type="checkbox"/> <b>Own</b> (Please attach 2020 property taxes) <input type="checkbox"/> <b>Rent</b> (Please attach 2020 rent receipts)</p> <p><input type="checkbox"/> <b>Other</b> (Please explain) _____</p> <p><input type="checkbox"/> <b>Sold Principal Residence in 2020</b> Address: _____ Year of Original Acquisition _____ Proceeds of Disposition: _____</p>	
<p><b>Current Home Address</b></p> <p>Apt. # _____ Street _____</p> <p>_____</p> <p>City _____ Prov. _____</p> <p>Postal Code _____</p>	<p><b>Mailing Address</b> (check if same as home) <input type="checkbox"/></p> <p>Apt. # _____ Street _____</p> <p>_____</p> <p>City _____ Prov. _____</p> <p>Postal Code _____</p>
<p><b>DEPENDANTS</b></p> <p>1. _____ / ____ / ____ SIN _____ Name DOB (yyyy/mm/dd) (M/F)</p> <p>2. _____ / ____ / ____ SIN _____ Name DOB (yyyy/mm/dd) (M/F)</p> <p>3. _____ / ____ / ____ SIN _____ Name DOB (yyyy/mm/dd) (M/F)</p> <p>4. _____ / ____ / ____ SIN _____ Name DOB (yyyy/mm/dd) (M/F)</p>	

<b>FOR OFFICE USE ONLY</b>	<b>CLIENT TRACK __ T1 __ QUICKBOOKS __</b>
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## Foreign Income Verification Statement (T1135)

### Declaration

Please choose one of the following with regards to Foreign Property Held in 2020 (foreign property includes funds held outside of Canada, shares of foreign companies even if held in a Canadian brokerage account (not in an RRSP), loans to non-residents, interests in non-resident trusts, real estate outside of Canada (other than personal use real estate) and any other property held outside Canada):

- A. No – I did not have any foreign property with a total cost of more than \$100,000CAD at **any** point in 2020.
- B. Yes – I did have foreign property during 2020 with a total cost of more than \$100,000CAD. I will prepare and file the form myself and I am aware of the potential \$2,500 penalty applied by the CRA if the form is not filed by the filing deadline of my personal tax return. I understand that the form is due by April 30, 2020 and must be mailed to the CRA.
- C. Yes – I did have foreign property during 2020 with a total cost of more than \$100,000CAD. I will obtain the required information for Precision Accounting to prepare the form. I understand that the completion of the form is not included in my 2020 quote to prepare my personal tax return and agree to pay the additional fees incurred to prepare the T1135 Form.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**2020 Tax Year  
Personal Income Tax Checklist  
Precision Accounting Professional Corp**

**Please use the checklist below to make sure you have included all of the documents for your taxes:**

<ul style="list-style-type: none"> <li>✓ <b>CRA Assessments:</b> <ul style="list-style-type: none"> <li>○ Last year's Notice of Assessment</li> <li>○ Instalment Payments</li> </ul> </li>   <li>✓ <b>Employment Income:</b> <ul style="list-style-type: none"> <li>○ T4</li> <li>○ T4A</li> <li>○ T4PS</li> </ul> </li>   <li>✓ <b>Employment Expenses:</b> <ul style="list-style-type: none"> <li>○ T2200 plus a list of the expenses</li> </ul> </li>   <li>✓ <b>Pension Income:</b> <ul style="list-style-type: none"> <li>○ T4A</li> <li>○ T4AOAS</li> <li>○ T4AP</li> <li>○ T4RIF</li> <li>○ T4RSP</li> </ul> </li>   <li>✓ <b>Investment Income:</b> <ul style="list-style-type: none"> <li>○ T3</li> <li>○ T5</li> <li>○ T5008</li> <li>○ T5013</li> </ul> </li>   <li>✓ <b>Capital Gains:</b> <ul style="list-style-type: none"> <li>○ T5013</li> <li>○ Trading summaries from Brokers</li> <li>○ Annual statement from Mutual Funds</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>✓ <b>Other Income:</b> <ul style="list-style-type: none"> <li>○ Rental income and expense information</li> <li>○ Self-Employment income and expense information (CPP contributions / EI premiums)</li> <li>○ COVID-19 benefits</li> </ul> </li>   <li>✓ <b>Deductions and Credits:</b> <ul style="list-style-type: none"> <li>○ RRSP (must be official receipts)</li> <li>○ Child care receipts</li> <li>○ Adoption expenses</li> <li>○ Support payment information</li> <li>○ Disability support deduction</li> <li>○ Caregiver/disability amount</li> <li>○ Moving expenses</li> <li>○ Tuition fees – T2202/2202A</li> <li>○ Student Loan Interest slips</li> <li>○ Union/Professional dues</li> <li>○ Labour sponsored funds – T5006/EVCC30</li> <li>○ Monthly bus passes – seniors only</li> <li>○ New Home Buyers</li> <li>○ Investment advice and accounting fees paid</li> <li>○ Interest on investment loans</li> <li>○ Donations (must be official receipts)</li> <li>○ Instalment payment information</li> <li>○ Medical/Dental/Optical receipts (less any reimbursements from Insurance)</li> <li>○ Premiums paid to Private/Travel Medical Insurance plans</li> </ul> </li> </ul>
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