

**2020 Personal Tax Return Checklist**

Name(s) \_\_\_\_\_  
 Address \_\_\_\_\_  
 Email Address \_\_\_\_\_ Phone# \_\_\_\_\_ Cell# \_\_\_\_\_

**Please answer all questions and provide details:**

**Details/additional information**

Did your marital status change in 2020  
 (including common law)? Yes  No  \_\_\_\_\_  
**(Please provide a copy of separation agreement)**

Do you have any new dependants? Yes  No  \_\_\_\_\_

Are you a Canadian Citizen? Yes  No  \_\_\_\_\_

If you are a Canadian Citizen, do you  
 want your name, address, and date of birth  
 provided to Elections Canada? Yes  No  \_\_\_\_\_

Did you own any foreign property at any time in  
 2020 (eg. foreign investments, real estate, etc.)? Yes  No  \_\_\_\_\_

If you are registered for direct deposit with CRA,  
 Did your banking information change during 2020? Yes  No  \_\_\_\_\_

**INCOME:**

Have you provided us with all of the T4,  
 T5 and/or T3 slips that you expect to receive? Yes  No  \_\_\_\_\_

Did you sell any stocks or bonds? Yes  No  \_\_\_\_\_

Did you sell any real estate (other than your home)? Yes  No  \_\_\_\_\_

Did you buy a new home? Yes  No  \_\_\_\_\_

**Did you sell your home (principal residence)?** Yes  No  \_\_\_\_\_

Please provide: address, year of acquisition,  
 original purchase price, proceeds of disposition) \_\_\_\_\_

Did you have any other sources of income in 2020? Yes  No  \_\_\_\_\_

**PLEASE SEE THE BACK OF THIS FORM FOR ADDITIONAL QUESTIONS AND TO ADD ANY OTHER INFORMATION**

