

2021 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 2021
(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
2021 (eg. foreign investments, real estate, etc.)? Yes No _____

If you are registered for direct deposit with CRA,
Did your banking information change during 2021? 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 2021? Yes No _____

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

