



T1 Personal Tax Pre Season Checklist

Last Name: _____ First Name: _____

It will soon be time to prepare your _____ tax return. Providing complete and accurate information will allow us to prepare your tax return timely and efficiently. With this in mind, we have attached a checklist and questionnaire to assist you gathering the required items.

Please review the attached checklist, note any changes and check the items you are including. Careful review of the checklist, customized, based on the previous year helps to ensure that all information is captured and that you are aware of changing legislation.

How we are operating:

You will receive a phone call once your return is completed to determine if you would like or require a meeting. If you do not require a meeting an electronic copy of the return along with the signature page will be emailed to you via TaxFolder. A paper copy of the return is always available for pick up at your convenience.

We can "meet" virtually or in person, as is your preference. Bentley prefers the loves and pets from in person meetings!

Debbie is available **by appointment only** on Wednesdays and Thursdays from 9 am to 7:30 pm. **Remember that there is no charge for a 15 minute review of the tax return**, should the meeting take longer extra charges may apply. **Please come prepared with questions about the return or any other financial health questions you may have.**

Please arrive or call in 5-10 minutes before your appointment so that we may confirm all contact information, take payment and make sure all technology is functional on both ends. This 5-10 minute preparation time will help to ensure that your appointment with Debbie is MAXIMIZED and help to keep Debbie on time so that wait times are minimized.

As a reminder, appointments not cancelled within 48 hours notice will be billed at the rate of \$350 per hour or fraction thereof.

Monday/Tuesday: 9:00 a.m. to 4:00 p.m.

Wednesday/Thursday: 9:00 a.m. to 7:30 p.m.

Friday, Saturday and Sunday: Closed

For holiday and computer maintenance closures please see the following link: Google MyBusiness

Documents can be dropped off in person to reception during business hours or the contactless back door slot. Alternatively, documents may be sent to us encrypted via E-courier: via the link: <https://e-courier.ca/aQ?tu=HfWu3>

Remember...if there are any slips missing, we should be able to download them automatically from the CRA website (Rep A Client). Make a note on your checklist which slips are missing so that we know to look for them.

Uncashed Cheques Please make sure you log into My Account. CRA has a section on the right hand side for any uncashed cheques. Follow the instructions to get the uncashed cheques reissued!

Audit Shield CRA is now in the process of auditing/reviewing COVID related benefits. Talk to us about the Audit Shield insurance that covers our fees in the event of a CRA audit or review. We will help you work out the cost vs benefit for your particular situation.

Principal Residence Reporting

All taxpayers who sell their home must report the sale on their tax return, even if it was their principal residence for the whole time they owned it. There are substantial penalties for not reporting the sale. If you sold your home in this tax year, please provide the details on the attached questionnaire.

Foreign Property Disclosure

Canadian resident individuals who held property outside Canada with a total cost more than \$100,000 CAD at any time in the tax year must comply with special reporting to the CRA. There are substantial penalties for noncompliance. Contact your financial planner/investment advisor for a foreign property report to be sure.



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Last Name _____ First Name _____

SIN _____ Birthdate _____ (mm/dd/yyyy)

Has your marital status changed? ☐ No ☐ Yes Date of change: _____ Status change to: _____

Are there any changes to your dependents? ☐ No ☐ Yes If yes, explain: _____

Are you a Canadian Citizen? ☐ Yes ☐ No

Do you agree to Canada Revenue Agency providing your name, address, and date of birth to

Elections Canada for the National Register of Electors? ☐ Yes ☐ No

Principal residence reporting: IF YOU SOLD IN THE REPORTING YEAR, please complete the following:

Complete address of the home sold (including postal code): _____ Year purchased: _____ Sale price: _____

Supporting documents

☐ Notice(s) of (re)assessment

☐ T4's, T4AP, T4E, T4OAS, T4RIF T4A's, T4RSP,
T5's, T3's, T5008's, T4PS, T5007, T5013

☐ Tips, gratuities, stock options

☐ Rental property revenue & expenses

([Fillable form here](#))

☐ Business, self-employed income & expenses (Including those from a sharing economy, ie. Uber, AirBnB) ([Fillable form here](#))

☐ Home Office Expenses Due to COVID-19

A [simplified method](#) for calculating a flat rate deduction for the tax year is available if no other employment expenses are claimed. Here are the [important details of how to claim it](#). The form is found on the [CRA Website](#). A detailed method is available on this form but requires a [T2200S](#) from the employer.

You must be at home because of COVID, not just that you are choosing to work from home.

Other/new income sources

☐ First year for CPP, OAS?

☐ Alimony and/or maintenance received

☐ RRSP contributions and withdrawal

☐ Realized Gain/Loss report for open investments

☐ Foreign Property report for all investments

☐ Foreign Income and taxes paid

Receipts

☐ Union or professional dues

☐ Donations: charitable and political

☐ Medical expenses, including plan premiums

Make sure these receipts are added or there will be additional fees

☐ Home Renovations for Seniors/Accessibility

☐ Child care/Adoption

☐ Student loan interest

☐ T2202 Tuition fees (from University/College website)

☐ Moving expenses ([Checklist here](#))

☐ Tradesperson Tools/Teacher Supplies

☐ T2200 Employment expenses ([Checklist here](#))

Make sure these expenses are added or there will be additional fees
Make sure employer has signed the form

☐ Investment expense (interest, mgmt. fees)

☐ Alimony and or maintenance paid

☐ Bitcoin and other cryptocurrency transactions

☐ Rent and/or property taxes

☐ First Time Home Buyers

☐ Seniors public transit tax credit

☐ Disability: any new diagnosis that could affect everyday life –
Diabetes, kidney, brain, sight

☐ Ontario Staycation tax credit

☐ Digital news subscription tax credit

☐ Federal income tax Installments



Dependants:

Name	Birthday	Tuition?	Rent?	Disabled?	Do we prepare the tax return?
1.					
2.					
3.					
4.					

If any contact information or relevant information not mentioned above please let us know immediately,
or advise us below.

Notes and Questions:
