

**PERSONAL TAX CHECKLIST 2020**

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Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
E-mail: \_\_\_\_\_

Tel. No: \_\_\_\_\_  
S.I.N: \_\_\_\_\_  
Birthdate: \_\_\_\_\_  
Marital Status: \_\_\_\_\_  
Spouses Name: \_\_\_\_\_  
Spouses S.I.N: \_\_\_\_\_  
Spouses Birthdate: \_\_\_\_\_

**DEDUCTIONS/CREDITS**

DID YOU SELL YOUR PRINCIPAL RESIDENCE DURING THE YEAR? \_\_\_\_\_  
if so, provide the statement of adjustments for the sale  
Employment expenses Form T2200 must be completed by your employer (see back page) \_\_\_\_\_  
Simplified working from home deduction during COVID-19, provide number of days working from home \_\_\_\_\_  
Digital news subscription amounts paid \_\_\_\_\_  
Commission expenses (e.g. automobile, promotion and entertainment, travel, supplies, samples, home office) – enter on next page \_\_\_\_\_  
RRSP contributions: \$ \_\_\_\_\_ (attach receipts) \_\_\_\_\_  
Lump sum transfer to RRSP \_\_\_\_\_  
Withdrew RRSP funds to purchase a qualifying home or education expenses: \$ \_\_\_\_\_ Date: \_\_\_\_\_ (provide full details) \_\_\_\_\_  
Union or professional dues (attach receipts) \_\_\_\_\_  
Alimony or maintenance (provide name, address, S.I.N # and amount paid) \_\_\_\_\_  
Moving expenses (provide full details and receipts) \_\_\_\_\_  
Child care expenses (provide name, address, S.I.N # and amount paid) \_\_\_\_\_  
Tuition fees for yourself and/or your dependents (attach receipts) \_\_\_\_\_  
First time homebuyer during 2020? \_\_\_\_\_  
BC Seniors Home renovation expenses \_\_\_\_\_  
Federal and Provincial political contributions \_\_\_\_\_  
Carrying charges in respect of investment income \_\_\_\_\_  
Tax shelter purchases (attach T5013 / T101) \_\_\_\_\_  
Disability credit (disability credit certificate required in current or prior years) \_\_\_\_\_  
Student loan interest expense \_\_\_\_\_  
Unreimbursed medical and attendant care expenses for self or other dependents \_\_\_\_\_  
Charitable donations (attach receipts) \_\_\_\_\_  
Accounting fees paid for tax planning or related to investments \_\_\_\_\_  
Other deductions \_\_\_\_\_

**ADDITIONAL COMMENTS, MISSING INFORMATION AND NOTABLE CHANGES FROM 2019**

**BUSINESS INCOME AND EXPENSES**

**EMPLOYEE AND COMMISSION EXPENSES**

Name of business: \_\_\_\_\_

Address: \_\_\_\_\_

For the period: \_\_\_\_\_ to \_\_\_\_\_

Are you registered for and do you charge GST/HST? \_\_\_\_\_ Yes \_\_\_\_\_ No

**REVENUE** \$ \_\_\_\_\_

**(Please see \*\* below)**

**EXPENSES**

**BUSINESS**

**EMPLOYEE & COMMISSION**

Cost of goods sold \$ \_\_\_\_\_

\$ \_\_\_\_\_

Advertising and Promotion \_\_\_\_\_

\_\_\_\_\_

Bad debts \_\_\_\_\_

\_\_\_\_\_

Bank charges and interest \_\_\_\_\_

\_\_\_\_\_

Business license, tax and dues \_\_\_\_\_

\_\_\_\_\_

Courier and delivery \_\_\_\_\_

\_\_\_\_\_

Insurance \_\_\_\_\_

\_\_\_\_\_

Meals and entertainment \_\_\_\_\_

\_\_\_\_\_

Management and administration fees \_\_\_\_\_

\_\_\_\_\_

Office (supplies, postage, etc.) \_\_\_\_\_

\_\_\_\_\_

Rent and property taxes, (excl. home office) \_\_\_\_\_

\_\_\_\_\_

Supplies \_\_\_\_\_

\_\_\_\_\_

Telephone (line, cell, fax) \_\_\_\_\_

\_\_\_\_\_

Travel \_\_\_\_\_

\_\_\_\_\_

Wages and benefits \_\_\_\_\_

\_\_\_\_\_

Utilities (exclude home office) \_\_\_\_\_

\_\_\_\_\_

Others \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Automobile See Auto Expense on next page

See Auto Expense on next page

Home office See Home Office on next page

See Home Office on next page

**\*\* If you are registered for GST/HST, the revenue should exclude GST/HST collected, and the expenses should exclude the input tax credit amount.**

**FIXED ASSETS PURCHASED DURING THE YEAR**

Amount

Equipment \$ \_\_\_\_\_

\$ \_\_\_\_\_

Furniture and fixture \_\_\_\_\_

\_\_\_\_\_

Computers - hardware \_\_\_\_\_

\_\_\_\_\_

Computers - software \_\_\_\_\_  
 Others \_\_\_\_\_

**AUTOMOBILE EXPENSES FOR THE YEAR**

Gas \_\_\_\_\_  
 Insurance \_\_\_\_\_  
 Repairs and maintenance \_\_\_\_\_  
 Parking \_\_\_\_\_  
 Car wash \_\_\_\_\_  
 License and registration \_\_\_\_\_  
 Interest on financing \_\_\_\_\_  
 Lease payments \_\_\_\_\_  
 Value of Automobile \_\_\_\_\_  
 Purchase of Automobile \_\_\_\_\_  
 during the year \_\_\_\_\_  
 No. of km - Business \_\_\_\_\_  
 No. of km - Total \_\_\_\_\_

**HOME OFFICE EXPENSES FOR THE YEAR**

Rent \_\_\_\_\_  
 Mortgage interest \_\_\_\_\_  
 Property taxes \_\_\_\_\_  
 Maintenance/strata fee \_\_\_\_\_  
 Repairs and maintenance \_\_\_\_\_  
 Utilities \_\_\_\_\_  
 Insurance \_\_\_\_\_  
 % of home office \_\_\_\_\_

\*Only fill in if claiming automobile expenses or home office expenses as required by employment or if self-employed. If claiming the simplified work from home deduction provide the number of days on the first page.

**RENTAL INCOME AND EXPENSES**

**ADDRESS OF RENTAL PROPERTY** \_\_\_\_\_

**NUMBER OF UNITS** \_\_\_\_\_

Rental Income _____	Accounting and Legal _____
Expenses _____	Property Tax _____
Advertising _____	Travel _____
Insurance _____	Utilities _____
Repairs and maintenance _____	Interest expense _____
Management and administration _____	Strata fees _____
	Assets purchased _____
	Other (Specify) _____

**FOREIGN ASSET REPORTING**

If you owned foreign property with a cost of greater than \$100,000 during 2020 such as vacation homes, foreign bank and securities accounts, shares of foreign companies, interests in foreign trusts or partnerships or interests in any property listed above, please describe. Please review our reporting letter for new changes to this form in 2020, especially regarding simplified reporting.