AT HOME TAX
PREPARATION SERVICES
PROFESSIONAL CORPORATION

T1 Personal Information Checklist

PERSONAL INFORMATION

Full Name	Apt./Suite – Building Number	Marital Status
S.I.N.	Street Name	Primary phone
Birthdate	City	Secondary phone
Citizenship	Postal Code	Fax
	Email	

Any family members disabled?   ____YES ____NO

Do you authorize CRA to provide informaon about you to Elections Canada?   ____YES ____ NO

Are you setup with CRA's My Account? (Will be required for Tax Year 2022)   ____YES ____ NO
    If NO, we can help you with setup.

SPOUSE'S INFORMATION

Full Name

S.I.N.

Birthdate

Citizenship

If we are not preparing your spouse's tax return: Taxable income figure

from line 26000 of their tax return:

If your marital status changed during the year, please provide the date it

changed (MM/DD/YYYY):

CHILDREN'S INFORMATION

CHILDREN'S INFORMATION	CHILDREN'S INFORMATION	CHILDREN'S INFORMATION
Full Name - Child 1	Full Name - Child 2	Full Name - Child 3
S.I.N.	S.I.N.	S.I.N.
Birthdate	Birthdate	Birthdate
Email	Email	Email
Attending Post-Secondary Intuition?	Attending Post-Secondary Intuition?	Attending Post-Secondary Intuition?
__ YES __ NO	__ YES __ NO	__ YES __ NO
-If yes please attach T2202A	-If yes please attach T2202A	-If yes please attach T2202A

SALE OF PRINCIPAL RESIDENCE

Did you sell your principal residence during the year? ____ YES ____NO

If YES: Year of Acquisition: _____ Proceeds of Disposition: _____

Did you own any other properties that could qualify as a principal residence? ____ YES ____ NO

FOREIGN REPORTING

Do you own foreign assets with a cost greater than $100,000 CAD? ____YES ____ NO

INCOME SOURCES CHECKLIST

Employment (T4 or T4A)

RRSP, RRIF, RESP (T4RSP/T4RIF/T4A)

Government pensions (T4A[OAS]/T4A[P])

Estates/Trusts/Mutual Fund (T3) . Off

Employment Insurance (T4E) . Off

Interest/Dividends/Capital Gains (T3/T5/T5013)

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TAX DEDUCTIONS / CREDITS CHECKLIST

(with official receipts)

RRSP Contributions

National Student Loan Interest

Union/Professional Dues . Off

Medical Expenses (net of any reimbursements)

Child Care Expenses (Incl. Name & SIN of Recipient)

Charitable or Political Donations (official receipts)

Moving Expenses (if at least 40km's closer to work)

First-me Home Buyer?

Accounting Fees (if rental, self employment or investment)

Teacher who pays for their own supplies?

Interest/Fees Paid on Investments (Non-Registered)

Tuion Fees (T2202A – Signed by Student)

Number of days worked from home due to Covid 19

CERB / CRB benefit is repaid

OTHER IMPORTANT DOCUMENTS CHECKLIST

Mutual Fund Investment Summary Statement

Tax Shelters (T101/T5013/Annual Reports)

Sale of Property: Address, Cost of property

T2200 Employer Authorization for Expenses (or T2200s if worked from home due to Covid 19)

Sale of Property: Seller's Statement of Adjustments

Court-Ordered Spousal Support Payments Paid

Sale of Shares: Gain/Loss Summary from Broker

Court-Ordered Spousal Support Payments Received

New Clients: Notice of Assessment for Prior Year

New Clients: T1 Tax Return Filed for Prior Year

New Clients: Signed CRA Authorization Form

Other:

OTHER INFORMATION CHECKLIST

(please provide if necessary)

Rental Income and Expenses (Please provide detail listing of rental income and expenses per property)

Self-Employment Income and Expenses
(Please provide detail listing of the income and expenses)

Employment/Commission Expenses
(Please provide detail listing of employment)

Signed T1 Engagement Letter

List of foreign property owned, including:

Country of Origin

Fair Market Value at Year-End

Highest Fair Market Value for The Year

Total Income and Total Capital Gains

Other:

Other:

Other:

Other:

INSTALMENT PAYMENTS

Have you made installment payments for the tax year?

____YES ____ NO

If YES: how much for yourself? $_____

If YES: how much for your spouse? $_____

If YES: how much for each child? $_____

DIRECT DEPOSIT / TAX REFUND

Has Your Direct Deposit Information Already Been Provided to CRA?

If NO: If You Would Like to Have Tax Refunds Directly Deposited, provide us with either:

A Void Cheque

OR

Branch Number (5 digits)   _____

Institution Number (3 digits)   _____

Account Number (Maximum 12 digits) _____