



Address: 201-6981 E Saanich Road

Office Hours: Mon-Fri 9am – 4pm

Contact email: admin@sheilahanson.ca

PERSONAL TAX ORGANIZER

For the year 2020

Please complete this personal tax organizer and attach all applicable slips, receipts, lists, and other supplemental information. Drop off at:

Address: 201-6981 E Saanich Road

Office Hours: Mon-Fri 9am – 4pm

Please note that any missing information, including supporting documents may be subject to our refiling surcharge.

1. Personal Information

Name		SIN	Date of Birth (dd/mm/yy)	Phone	
				Office	Ext.
Taxpayer					
Spouse					
Address				Home:	
				Mobile:	
Email:					

Marital Status:

Married Single Common-law Separated Divorced Widowed

If married or common-law, should your return be filed jointly with your spouse's return?

Yes No

If your marital status changed in 2020, provide date of change (dd/mm/yy): _____

2. Residence

Province or territory of residence on December 31: _____

Did the taxpayer immigrate to Canada or emigrate from Canada during the year? Yes No

If yes, provide date of entry into Canada _____ or date of departure _____

3. Elections Canada

Is the taxpayer a Canadian citizen? Yes No

If yes, the taxpayer authorizes the CRA to provide his/her name, address and date of birth to Elections Canada to update his/her information on the National Register of Electors. Yes No

4. Foreign Reporting – T1135

Did the taxpayer own or hold foreign property with a total cost between CAD\$100,000 and CAN\$250,000 at any time during the year? Yes No

Did the taxpayer own or hold foreign property with a total cost of more than CAN\$250,000 at any time during the year? Yes No

If yes, please provide us with a list and all relevant details.

5. Change in Personal or Financial Situation During the Year

Date the taxpayer declared bankruptcy during the year: _____

Date the taxpayer refinanced a business with new or revised debt: _____

Date the taxpayer closed a bank account or investment account: _____

6. Dependents

Name	Relationship	Date of Birth (dd/mm/yy)	SIN	Physically or Mentally Infirm?	Income	Child Care Expenses

Universal child care benefits (UCCB) – Is RC 62 slip attached? Yes No

If the taxpayer is a single parent, is the UCCB designated to a dependent? Yes No

7. General Income/Deductions

T4 slips – Employment Income? Yes No

T4A – Commission and self-employment? Yes No

T4A – Recipient of CERB, CESB, CRB, and CRSB? Yes No

T4E – Employment insurance? Yes No

T5007 – Social assistance? Yes No

Employment income or taxable benefits not shown on the T4 slip? Yes No

Provide us with the amount paid for union and professional dues as well as the names of the organizations? _____

List of child care expenses, with receipts, for each child? Yes No

List of moving expenses paid? Yes No

List of spousal support payments made or received? Yes No

List of deductible employment expenses? Yes No

List of work-from-home claim deductions Yes No

If the work-from-home claim deductions applies to you, please confirm the following:

- You worked from home in 2020 due to the COVID-19 pandemic or your employer required you to work from home, Yes No
- You worked more than 50% of the time from home for a period of at least four consecutive weeks in 2020, Yes No
- You have a signed form T2200S or form T2200 from your employer, Yes No
- You have expenses are used directly in your work during the period. Yes No

If you worked more than 50% of the time from home for a period of at least four consecutive weeks in 2020 due to COVID-19, please provide us with the total number of days you worked from home in 2020 due to COVID _____ days

8. Pension Income

- T4A – Pension, retirement and annuity income? Yes No
- T4A (P) – Canada pension plan benefits? Yes No
- T4A (OAS) – Old age security pension slip/foreign pensions? Yes No
- T4A-RCA – Retirement compensation arrangements? Yes No
- T4RSP – Registered retirement savings plan income? Yes No
- T4RIF – Registered Retirement income fund income? Yes No
- Does the taxpayer elect to split eligible pension income with his/her spouse or common-law partner? Yes No

9. Investment Income/Deduction

T3 – Income from trust allocation? Yes No

T5 – Investment income? Yes No

T4PS – Income from profit sharing plans? Yes No

T5013 – Partnership income? Yes No

T5008 – Income from securities transactions? Yes No

Did the taxpayer dispose of property or investments (including a principal residence) during the year? If so, provide the following details in a separate list:

Description of Property & Quantity	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal

Interest paid to earn investment income _____ Management fees _____ Accounting/legal fees _____

10. Self-Employment/Business Income

Financial statement(s)/ schedule of revenue and expenses attached? Yes No

Has the taxpayer registered to be eligible for Employment Insurance special benefits? Yes No

If an owner/manager, did the taxpayer has a shareholder loan outstanding during the year? Yes No

If yes, provide details of borrowings, repayments, and year-end balance if owner/manager owes the company money:

If the taxpayer used a vehicle for business, are the vehicle expenses and both total and business mileage attached? Yes No

If the taxpayer used a portion of his/her home for business, are the home expenses and both total and business square footage attached? Yes No

Is a list of all asset additions and disposals (including cars equipment, etc.) attached? Yes No

11. Rental Income

If the taxpayer owned rental property, is a statement of rental income attached? Yes No

Does the taxpayer also live in the rental property (in which case no CCA should be claimed)? Yes No

12. RRSP/pool registered pension plan (PRPP) Contributions

T-slips for contribution made attached? Yes No

Were there any amounts repaid during the year to a home buyers' plan or a lifelong learning plan? Yes No

13. Other Credits

- T2202 – Tuition/education amount for taxpayer? Yes No
- T2202 – Tuition/education amount claimed on transfer from dependent? Yes No
- Receipt or amount for taxpayer's student loan interest? Yes No
- Receipts/listing of all medical expenses paid in the year for taxpayer, spouse, and dependents? Yes No
- First-time making charitable donations? Yes No
- Receipts for charitable donations or donations made by way of gifting an item in kind? Yes No
- Were any loans associated with the charitable donations? Yes No
- Receipts for political contributions? Yes No
- List of eligible teaching supplies purchased (for teacher and early childhood educators only)? Yes No
- Public transit passes (receipts/details)? Yes No
- Receipts/listing for fitness and arts activity amounts paid for each child? Yes No
- Information pertaining to the purchase of a new home to claim the first time home buyers' amount? Yes No
- Amount of property taxes/rent paid in the year and name of landlord/municipality? Yes No
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14. Prior Year Tax Return Information/Correspondence

Is a copy of the Notice of Assessment for last year's tax return attached? Yes No

If new to the firm, are tax returns (and corresponding Notice of Assessment) for the last three years attached? Yes No

If taxpayer claimed a loss carryback in any of the preceding 3 years, are the Notices of Reassessment for those years attached? Yes No

Is a copy of any other correspondence from the Canada Revenue Agency attached? Yes No

If you would like your tax refund deposited directly into your account and if you have not already registered for direct deposit, is a void cheque attached? Yes No

Is your statement of instalments paid for the year attached? Yes No

If you have any questions, please kindly email your question to:

admin@sheilahanson.ca

Once your tax is completed, we will contact you for pick up.