

BULAT & POUSTIE

CHARTERED PROFESSIONAL ACCOUNTANTS

ELECTRONIC COPY	
<input type="checkbox"/>	I would like to receive my personal income tax return and related correspondence electronically .
<input type="checkbox"/>	I would like to receive both electronic and paper copies of my return and related correspondence.
<input type="checkbox"/>	I would like a paper copy only of my return and related correspondence.
NAME	EMAIL ADDRESS

GENERAL INFORMATION	
Name: _____	Spouse: _____
S.I.N.: _____	S.I.N.: _____
Date of Birth: _____	Date of Birth: _____
Address: _____	
Phone: Home _____	Work _____ Cell _____
Dependant (Name/Sex/Date of Birth): _____	
Dependant (Name/Sex/Date of Birth): _____	
Dependant (Name/Sex/Date of Birth): _____	

GENERAL AND INCOME	Y/N	ITEMS NEEDED TO COMPLETE RETURN
2020 Notice of Assessment		
Tax instalments made		Copy of receipts or statement from CRA
Employment income		T4 slip
Old Age Security pension		T4A(OAS) slip
Canada Pension Plan benefits		T4A(P) slip
Employment Insurance benefits		T4E slip
Pension income		T4A, T4RIF, T4RSP slip
Investment (dividends, interest, etc.) income		T3, T5 slip
Partnership / limited partnership income		T5013 slip
Rental property		Income and expense information
Business / professional income		Income and expense information
Gains and losses from investments, property, etc.		Broker summary, other supporting documentation
Workers' Compensation benefits		T5007 slip
Other income		T4A, other supporting documentation
Sale of Principal Residence		Proceeds of disposition, date of purchase and sale
Other		

DEDUCTIONS and CREDITS	Y/N	ITEMS NEEDED TO COMPLETE RETURN
Contributions to RRSP		RRSP contribution slips
Union or professional dues		Tax receipts
Moving expenses		Date of move and expense details
Investment related expenses		Broker / bank receipts
Investment counsel fees		Broker statements
Child care expenses		Receipts from care provider
Employment expenses including auto costs		Form T2200, summary of expenses and auto log
Caregiver amount		Physicians statement
Support payments		Information on whom paid to / received from
Eligible tuition		Form T2202 from educational institution
Eligible Canada training credit expenses		Form T2202 from educational institution
Eligible educator school supply tax credit		Store receipts
Fitness / Children's art expenses (Manitoba)		Official receipts
Fitness –16-24 years old (Manitoba)		Official receipts
Volunteer Fire Fighters/Search and Rescue amount		Hours worked and any amounts received
Charitable / political donations		Official receipts
Bought your first house in 2021?		Provide details
Medical expenses and health plan premiums (incl. travel health)		Official pharmacy and other medical receipts
Property taxes or rent		Property tax bill or rent receipts
Interest paid on student loans		Interest statement
Tool expenses (tradespersons)		Receipts
Digital subscriptions		Receipts
Office in home (self employed, certain employees if required by employer)		Sq footage of office vs total sq footage & Utilities/Property tax/ repairs/ Mortgage interest/ insurance
Office in home (COVID-19)		Number of days worked at home, or same info as above
Wage Subsidies (Self-employed only)		Details on subsidies claimed
Canada Emergency Business Account Loan (Self-employed only)		Loan amount and date

NOTE: for the 2021 tax year the Climate Action Incentive (CAI) will not be a refundable credit on your tax return, rather a quarterly cheque will be sent out starting July 2022

FOREIGN INVESTMENTS	Y/N	ITEMS NEEDED TO COMPLETE RETURN
U.S. Citizen or Green Card Holder		Provide information
Foreign investments in excess of \$100,000		Provide amounts and details of investments
Significant amount of time outside Canada		Provide details of time spent outside Canada

Notes and special instructions