

2020 PERSONAL TAX CHECKLIST:

New this year... [upload tax documents through secure link e-courier](#)

No Printer? Need a paper copy? Yes or No

Taxpayer's Name		Marital Status			Tax Year
		Spouse's Name			
Taxpayer SIN & Birthdate (dd/mm/yy)		Spouse's SIN & Birthdate (dd/mm/yy)			
Address				Contact Information	
				Email:	
				Phone:	
ITEM		NA	Yes	No	NOTES
Did you apply for COVID Benefits?					
T-Slips (T3, T4, T4A, T4E, T4OAS, T4P, T5, T5018, T4RSP, etc.)					
Donation Receipts					
RRSP Slips					
Medical Receipts					
Child Care Receipts					
Capital Gains/Losses (Year & Price of purchase and sale) and associated fees					
Are you claiming Home Office Expenses? If Yes – Provide completed T2200 and related expenses.					
T2200A Tuition Slip, Tuition amounts Certificate					

ITEM	N/A	Yes	No	NOTES
Business (Income and Expense) –Client provided information (excel or books & records)				
Interest on money borrowed to invest (Statements or Amounts)				
Other Investments				
First Time Home Buyer				
Did you sell your principal residence (the house you lived in) in 2019				
Did you change the use of your real estate property? (Rental to Principle or vice versa)				
Foreign Property (over \$100,000)				

DEPENDENT INFORMATION

Name	Relationship	Date of Birth (dd/mm/yy)	SIN	Income

SUMMARY:

Once you have collected the applicable information please forward through our **website www.dalevinson.com**. We will prepare your return, based on the information you provide to us, and electronically file it with Canada Revenue Agency. It is your responsibility to ensure the accuracy and completeness of this information. We do not audit, review or otherwise verify the accuracy of this information. Any questions contact at admin@dalevinson.com

I confirm the accuracy and completeness of the information provided and agree to the terms outlined above.

_____ Signature

_____ Please print name