

1. Personal Information

	Taxpayer	Spouse
Name		
Date of Birth		
SIN		
Phone		
Email		
Address		

Marital Status: Married Single Common-Law Separated Divorced Widowed

If married or common-law, provide spouse's net income if filing separately? _____

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

Did you sell your principal residence in 2020? Yes No

Would you like MBA CPA Inc. to represent you with Canada Revenue Agency? Yes No

2. Residence

Province or territory of residence on December 31, 2020: _____

Did you 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

Are you a Canadian Citizen? Yes No

If yes, do you authorize CRA to provide information to Elections Canada to update the National Register of Electors. Yes No

4. Foreign Reporting – T1135

Did the taxpayer own or hold foreign investment property with a total cost of more than CDN \$100,000 at any time during the year? Yes No

5. Dependants

A dependant is someone related to you who is dependent on you for support at some time in the year

Name	Relationship	Date of Birth	SIN	Physical or Mental Impairment?	Income

6. General Income/Deduction

T4 slips – Employment income? Yes No

T4A – Other income (i.e. Covid Subsidies) Yes No

T4E – Employment insurance? Yes No

T5007 – Social assistance? Yes No

Employment income or taxable benefits not shown on T4 slip? Amount paid for union and professional dues and organization names? Yes No

Receipts for child care expenses, with receipts, for each child? Yes No

Receipts for moving expenses paid in the year? Yes No

Receipts for support payments made or received? Yes No

Receipts for Home office expenses due to Covid-19? Yes No

Detailed Method (T2200S) Yes No

Temporary Flat Rate Method (# of days worked Yes No

from Home) _____ days

Receipts for deductible employment expenses (T2200)? Yes No

Is a signed form T2200 attached? Yes No

7. Pension Income

- T4A – Pension, retirement and annuity income? Yes No
- T4AP – 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 withdrawal? Yes No
- T4RIF – Registered retirement income fund withdrawal? Yes No
- Do you elect to split eligible pension income with your spouse or common-law partner? Yes No

8. Investment Income/Deductions

- T3 – Income from trust allocations? 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 you dispose of property? If so, provide details on the sale such as documents to support the selling price, purchase price and any additional costs such as major renovations.

Did you dispose of investments? If so, provide capital gain summary from Broker.

Interest paid to earn income \$ _____

Management fees paid \$ _____

Accounting/legal fees paid \$ _____

9. Self-Employment/Business Income

- Financial statement(s)/schedule of revenue and expenses attached? (see attachment for schedule) Yes No
- Are you GST registered? GST # _____ Yes No
- If yes, is MBA CPA Inc. to file your GST return? Yes No
- Have you registered to be eligible for Employment Insurance Special Benefit? (maternity, parental, and sickness coverage) Yes No
- Have you registered for WCB personal option protection? (coverage for self-employed individuals) Yes No

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

10. Rental Income

If you owned rental property, is a statement of rental income attached?
(see attachment for schedule) Yes No

11. RRSP/PRPP Contributions

T-slip for contributions made attached? Yes No

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

12. Other Credits

T2202A – Tuition amount for yourself? Yes No

T2202A – Tuition amount claimed on transfer from dependent? Receipt or Yes No

amount for taxpayer's student loan interest? Yes No

Receipts/listing of all medical expenses paid in the year for yourself, spouse,
and dependents? Yes No

Receipts for political contributions? Yes No

Digital News Subscription expenses (receipts/details)? Yes No

Statement for new home to claim the home buyer's amount? Yes No

Eligible educator's school supplies expenses Yes No

13. Prior Year Tax Return Information/Correspondence

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

If you would like your tax refund deposited directly into your account, is a
void cheque attached? Yes No