L.R.BRAGER & ASSOCIATES
CHARTERED PROFESSIONAL ACCOUNTANT

2021 Canadian Personal Tax Checklist

ENTER PERSONAL INFORMATION HERE (click on the link)

INCOME SOURCES AND RELEVANT SLIPS

* T3 slips may not be received until March 31st

- ☐ Employment income T4
- ☐ Pension, Retirement, Annuity, or Other income T4A
- ☐ Canada Emergency Response Benefit / Canada Recovery Benefit T4A
- ☐ Profit sharing incomeT4PS
- ☐ Old Age Pension T4AOAS
- ☐ Canada Pension Plan T4A(P)
- ☐ RRSP withdrawals or income T4RSP
- ☐ RRIF income T4RIF
- ☐ EI Benefits T4E
- ☐ WCB T5007
- ☐ Social AssistanceT5007
- ☐ Investment ncome T5/T3 *
- ☐ Limited partnership T5013

COVID-RELATED BENEFITS

If you were one of the many Canadians and CERB, CRB, or other Covid-19 emergency benefits, these benefits are taxable, and you should receive a T4A showing the amount received.

No tax was withheld on the CERB and only 10% was withheld on CRB leaving most recipients with a pending tax bill

FOREIGN INCOME & ASSET REPORTING

CRA requires reporting of foreign assets at an aggregate cost of $100,000 CAD or more. Form T1135 (Foreign Income Verification Statement) must be filed by the date that your regular tax return is due. There are significant penalties for late or not filing. Advise us if you have any foreign-owned assets so we can determine whether you must file the T1135 with CRA.

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OTHER INCOME SOURCES

☐	Rental income	Schedule of gross rental activity
☐	Real property disposition	Proceeds of sale & details of adjusted cost base
☐	Investments disposition	Proceeds of sale and details of adjusted cost
☐	Self-employed income	Proceeds of sale and details of adjusted cost
☐	Alimony / Child Support	Total received; taxable portion; copy of agreement
☐	Other income details	(not reported on T-slips, ie. Foreign income, tips, etc.)

TAX CREDIT AND DEDUCTION SOURCES

☐	Employment expenses (T2200/T2200s)	☐	Charitable donations
☐	Moving Expenses	☐	Political contributions
☐	Alimony payments made	☐	Tuition fees (for your dependents)
☐	RRSP contributions	☐	Infirm / caregiver credit
☐	Registered Pension Plan contributions	☐	Adoption expenses
☐	Investment loan interest	☐	Disability credit
☐	Legal expenses to collect salary/wages	☐	Interest on student loans
☐	Child care expenses	☐	Medical expenses
☐	Clergy residence deduction	☐	Labour sponsored funds contribution
☐	Union dues	☐	Home Buyer's Credit
☐	Professional association dues	☐	Tax instalment payments made
☐	Travel expenses for employment	☐	BC Senior's Home Renovation Tax Credit

**** Working at home in 2021 due to Covid? The CRA is allowing two simplified methods for home office deductions. The first is the Temporary Flat Method of $2/day up to $500 maximum deduction with no receipts or employer form. The second is the Detailed Method and requires you to keep receipts and to receive from your employer form T2200S Declaration of Conditions of Employment for Working at Home Due to COVID-19**

CAPITAL ASSETS BOUGHT/SOLD

If you have rental or self-employed income, provide details of capital assets purchased or disposed.

Any changes to personal profile: Marital status, Dependents,
Address & Phone Number (Please ensure that we have record of
all your dependents)

Province of residence on December 31, 2021
Home Buyer Plan and/or Life Learning Plan repayment schedule
Details on foreign property owned at any time in 2021
Direct deposit information — bank account transit, bank, and account information or a void cheque
GST return(s) to file

Thank You for providing this information!

Providing us with your most current information will allow us to provide you with the best service when completing your tax return.

SCHEDULES (See below)

Name of Business

Type of Business and address if different from home

Joint Owner %

Income $

Expenses

Advertising	$
Licenses, Dues, Fees	$
Insurance	$
Interest/Bank Charges $	$
Meals/Entertainment	$
Office Supplies	$
Legal & Accounting	$
Rent	$
Salaries	$
Telephone	$
Other Expenses	$
	$
	$

New Equipment Furniture space (if you need more attach list)

Registered for GST ☐ Yes ☐ No

If yes, do you the above figures include GST?

Automobile ☐ Yes ☐ No

(fill in at bottom right)

Please provide us of your signed T2200 (Declaration of Employment Conditions. If you are claiming the simplified method then one is not required.

Expenses

Accounting/Legal Fees	$
Advertising/Promotion	$
Meals/Entertainment	$
Office Supplies	$
Lodging/Travel	$
Parking	$
Telephone	$

If your employer registered for GST ☐ Yes ☐ No

Other Expenses $

$

Were you reimbursed from your employer for part or all the expenses

☐ Yes ☐ No

(If yes please provide details)

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Home Office ☐ Yes ☐ No
(Fill in below)

Home Office Expense

Business or Employment Use %
(percentage of home used for business or employment based on square footage of office)

Expenses

Heat	$
Hydro	$
Water	$
Insurance	$
Maintenance/Repairs	$
Mortgage Interest	$
Property Taxes/Rent Paid	$
Other	

Automobile ☐ Yes ☐ No
(fill in below)

Automobile Expenses

Year/Make of Car:

_____

Purchase Price*	
Year Purchased **	
Total km driven (2019)	
Business or Employment Use Km's	

Expenses	Total
Fuel	$
Repairs/Maintenance	$
Insurance	$
Loan Interest	$
Lease Payments	$
Any per km allowance received	$
Other Expenses	$

*If leased vehicle, please provide a copy of purchase/lease paperwork.

** If a vehicle was disposed of in the year, please provide details.

Rental Property Income & Expenses

Address:

Joint Owner and %_____ _____

Income (rent collected) _____

Expenses $ _____

Advertising $ _____

Insurance $ _____

Mortgage Interest $

_____

Repairs/Maintenance $ _____

Property Taxes $ _____

Salaries/Administration $ _____

Utilities $ _____

Condo Fees $ _____

Other Expenses $ _____

_____ $ _____

_____ $ _____

$ _____

Major Renovations & Purchases (i.e. Appliances)

_____

_____

_____

If the property was purchases in the year, please provide the details.

Sale of Real Estate (Including principle residence)

Address:

Date Sold:

Joint Owner and %_____ _____

_____

Date of Purchased

Price Purchased $ _____

Legal Cost on Purchase $ _____

Additions/major improvements: $

_____ $ _____

_____ $ _____

_____ $ _____

Sale Price $ _____

Legal Cost on Sale $ _____

Insurance $ _____

Commissions Pain on Sale $ _____

Other Selling Expenses $ _____

_____ $ _____

_____ $ _____

_____ $ _____

Please Provide the purchase and sale documents