



FULL SERVICE ACCOUNTING | TAX PREPARATION

2020 Personal Income Tax Organizer

Please consider completing this tax organizer and returning it with your tax documents

1. Your Personal Information

	Name	Cell phone	Home phone
Taxpayer			
Spouse/Partner			

Address	
---------	--

Email address	
---------------	--

If your marital status changed during the year, please provide the date of change _____

Your province of residence on December 31, 2020 _____

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

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

2. Dependants

Name	Relationship	Date of Birth	Disabled or Infirm?	Child Care Expenses?

Provide details of any relations dependant on you, including children, parents, grandparents, or other relations.

3. Foreign Reporting Requirements

Did you own or hold foreign property, including investments, with a total cost of \$100,000 or more at any time during the year? If yes, additional information may be required. Yes No

4. General Income & Deductions

T4 slips? (Employment income) Yes No

T4A Slips? (Commissions and Self Employment) Yes No

T4E? (Employment Insurance) Yes No

T5007? (Workers Compensation / Social Assistance) Yes No

Did you receive any COVID related benefits (CERB, CRB, CESB)? Yes No

Other employment income or benefits not shown on T slips? Yes No

Tools purchased by tradespersons and apprentice mechanics? Yes No

Union dues or professional fees? (e.g. nurses' license, etc.) Yes No

Child care expenses? Yes No

Moving expenses? Yes No

Spousal support made or received? Yes No

Scientific research and experimental development expenses? Yes No

Employment expenses? (e.g. truck drivers, forestry workers, home office) Yes No

If yes, is a signed form T2200 included? Yes No

Clergy Residence Deduction? Yes No

Attendant care expenses for disabled persons? Yes No

Interest paid on student loans? Yes No

If you are a teacher, do you have expenses for school supplies? Yes No

Do you live in a zone which qualifies for the Northern Residents Ded'n? Yes No

5. Pension Income

T4A Pension Income? Yes No

T4A(P) Canada Pension Plan benefits? Yes No

T4A(OAS) Old Age Security benefits? 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

6. Investment Income & Deductions

- T3 Statement of trust allocations? Yes No
- T5 Investment income? Yes No
- T4PS Income from profit share plans? Yes No
- T5013 Partnership Income? Yes No
- T5008 Income from securities transactions? Yes No

If you disposed of any investments during the year, be sure to provide us with the details of the cost of these investments. Your investment manager may be able to assist with these numbers.

Did you dispose of any real property (e.g. land) during the year? Yes No

If yes, please provide the details of the cost and the selling expenses for this property

Interest paid on investment loans? Yes No

Management or investment counsel fees? Yes No

7. Sale of Principal Residence

Did you dispose of a property that may qualify for your principal residence? Yes No

If yes, provide the following details for each property sold

Address and property description	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Selling expenses

8. Self-Employment & Business Income

If you have business income, please provide a statement of business income and expenses, or the supporting documents.

Yes No

Did your business receive a Canada Emergency Bank Account (CEBA) loan?

Yes No

Did your business receive any wage subsidies (TWS or CEWS)?

Yes No

Did your business receive the Canada Emergency Rent Subsidy (CERS)?

Yes No

Did you receive support under any Canada Recovery Benefit programs?

Yes No

Did your business receive any other COVID benefits (provincial or federal)?

Yes No

Do you wish to be registered for Employment Insurance special benefits?

Yes No

Did you use your personal vehicle for business purposes?

Yes No

If yes, a log book should be made available.

Did you use a portion of your home for business purposes?

Yes No

If yes, square footage details and home expenses should be made available.

Did you purchase or sell any business assets (equipment, buildings, etc.)?

Yes No

If yes, please provide details including receipts and loan documents.

Do you earn income from a website or webpages?

Yes No

Did you hire an apprentice during the year?

Yes No

9. Rental Income

If you owned rental property, is a statement of rental activity attached?

Yes No

Were any renovations or improvements carried out on the rental property?

Yes No

Were any properties rented to family members below market value?

Yes No

10. Registered Retirement Savings Plan (RRSP) Contributions

Did you make any contributions to Registered Savings Plans?

Yes No

Were any repayments required to be made to a Home Buyers Plan, or to the Lifelong Learning Plan?

Yes No

11. Other Questions to Answer - continued

- Do you have receipts for a digital news subscription? Yes No
- Do you have a summarized medical printout from your pharmacy? Yes No
- Other medical expenses? (dental, eyecare, medical insurance premiums, etc.) Yes No
- Did you travel over 40 kms for medical reasons? Yes No
- Did you complete any medical related modifications to your home? Yes No
- Do you have charitable or political donation receipts? Yes No
- Are you a caregiver for any infirm family members? Yes No
- Did you provide support or care for a parent or grandparent 65 years of age or over, or an infirm dependant relative? Yes No
- Are you a first-time home buyer in 2020? Yes No
- Are you a volunteer firefighter or search-and-rescue volunteer? Yes No
- Do you want your tax refund deposited directly into your bank account? Yes No

If you are not already set up with direct deposit, please provide us with the direct deposit information

Other Helpful Items

1. The **Disability Tax Credit** is often overlooked by taxpayers. Ask us about this if you have difficulty with eyesight, hearing, walking, feeding/dressing, mental functions, or eliminating. Other conditions such as diabetes and kidney dialysis may also qualify.
- 2 Do you want instant access to your tax return status, your Notice of Assessment, and your RRSP and TFSA information? Sign up for MyAccount with the Canada Revenue Agency, at www.cra.gc.ca/myaccount. You can also view past tax returns, see details of your Canada Child Benefit and other benefits, plus much more.
- 3 Have you applied for the **Nova Scotia Heating Assistance Rebate**? The deadline is March 31. Call 1-800-670-4357 for information or for the forms.
- 4 First time home buyers may be able to receive assistance under the **First Time Home Buyer Incentive**.

see over for more info →

Giving Back

One thing the pandemic has reminded us of is the importance of community, and the support of each other. If you are in a position to give back, there are many ways to make a difference.

- **Your community.** Don't forget to check in with people you know. The elderly, disabled, or anyone that needs a hand with errands, shopping or a listening ear - a phone call can make all the difference.

- **Donate.** It doesn't need to be a lot! And it can be done easier than you might think. To find your local food bank and even donate online, go to www.feednovascotia.ca. You can also support nearly any charity - just go to www.canadahelps.org and search for your local charity.

- **Volunteer.** Yes, it has become a bit more difficult to volunteer at some locations with the need to distance. Try calling 211 or go to ns.211.ca to find ways you can volunteer.

Change in a COVID world

The pandemic brought a vast array of relief programs. For those who require assistance, you may be wondering what is available. Fortunately, there is a very good resource that can quickly guide you through this. The following website will ask you a number of questions about your situation and then provide you with a list of programs that may be of help to you.

Individuals may qualify for the Canada Recovery Benefit, Canada Recovery Sickness Benefit, or the Canada Recovery Caregiver Benefit.

Self-employed individuals may qualify for the Canada Emergency Bank Account (CEBA), the Recovery Benefits, and certain Rent/Property Ownership assistance. Employers may also qualify for wage subsidies to help pay employee wages.

see benefitsfinder.services.gc.ca for a complete list