# BLR LLP

**est. 1986**

**CHARTERED PROFESSIONAL ACCOUNTANTS**

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### 2021 INCOME TAX RETURN CHECKLIST
(Please complete and return with your tax information)

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Please use this checklist to help organize all the items required to complete your tax return. Please check off appropriate boxes. Please be sure to advise us of any changes in address or marital status.

If you, or a family member, have become disabled during the year you may be eligible for additional tax credits.

<mark>If you have had a child enter your family ensure that you provide a name, a date of birth and the sex of your child.</mark>

Name: _____

Name: _____

Children _____

Phone: _____        _____        _____
(during day)                    (home)                    (cell phone)

Email: _____

NOTE:     Canada Revenue Agency  (CRA) requires that if you owned foreign income producing property with a cost  of more than $100,000 (Cdn) at any time during 2021 you must provide certain information on your tax return.  Please advise us if this applies to you.

CRA now requires taxpayers to report the sale of any real estate. This rule will apply even if the property is your principal residence. Please advise us if you sold any property in 2021.

|  |  |  | 'X' | Additional information |
|---|---|---|---|---|
| **INCOME:** | | | | |
| Employment: | (T4, T4A) | | ☐ | _____ |
| Investment/interest/dividends: | (T3, T5, T5013) | | ☐ | _____ |
| Pensions: | RRSP/RRIF/Annuities | T4RSP, T4RIF,T4A | ☐ | _____ |
| | Canada Pension | T4A(P) | ☐ | _____ |
| | Old Age Security | T4OAS | ☐ | _____ |
| | Employer | T4A | ☐ | _____ |
| | CERB | | ☐ | _____ |
| | Foreign sources | | ☐ | _____ |
| Business (complete schedule which can be found at www.blrcpa.ca): | | | ☐ | _____ |
| Rental property (complete schedule which can be found at www.blrcpa.ca): | | | ☐ | _____ |

Capital gains/losses: - Sale of investments - provide information on
          original cost, proceeds, expenses, dates
        - Broker statements or summaries would be very helpful        ☐     _____
        - Annual statements from Mutual Fund companies

Other income (please provide details on separate page):
        - Spousal support                                              ☐     _____
        - Other sources of income for which no slips
          were received.

CHECKLIST CONTINUED:                                                Additional information
                                                        'X'        _____


DEDUCTIONS

RRSP contributions:   receipts required                 ☐          _____

Union or professional dues:    (if not included on your T4)   ☐    _____

Child care:  Provide name, address and SIN of caregiver, if applicable
            If your child attended an overnight camp
            provide the number of weeks at camp.          ☐        _____

Carrying charges:                    interest             ☐        _____
                                     management fees      ☐        _____

Employment/commission expenses (complete employment expense schedule (www.blrcpa.ca)
      -  include T2200 or T2200S from your employer)      ☐        _____

Spousal and child support payments (provide breakdown between child and spousal support)   ☐   _____
Moving expenses (==contact us if you moved 40 kms closer to a new place of work==)   ☐   _____

NON-REFUNDABLE TAX CREDIT INFORMATION

Tuition fees for self or dependants                       ☐        _____
      - have dependants sign T2202A where requested
Medical expenses paid, including health insurance premiums
      - enclose all receipts                              ☐        _____
      - for prescriptions consider obtaining a summary from your pharmacy
      - all pages are required                                     _____
First-time home buyers' credit (include agreement of purchase and sale)   ☐   _____
Charitable donations (include receipts)                   ☐        _____
Political donations (include receipts)                    ☐        _____
Interest paid on student loans (official statement required)   ☐   _____

PROVINCIAL TAX CREDIT INFORMATION

Rent or property tax paid on principal residence
(obtain and include receipts displaying address and landlord's name if you rent)   ☐   _____
(provide copy of final property tax bill if you own)

INCOME TAX INSTALMENTS MADE DURING THE YEAR               ☐        _____


Are you a U.S. citizen, a U.S. green card holder or were you born in the U.S.?   Yes   ☐        No   ☐

CRA, in conjunction with Elections Canada, asks whether or not you will
give your consent to provide Elections Canada with your name, address and date of birth only.
I am a citizen of Canada                                  Yes   ☐        No   ☐

The purpose of this is to keep the National Register of Electors up to date for future elections. Would
you please indicate your decision on this matter below.
                                        Yes, consent given   ☐    No, consent denied   ☐