

# Memory aid for your income tax returns

We recommend you check the items which may apply to your situation and then gather all the relevant documents before doing your tax return or before talking with tax preparer.

## Important documents

- 1 - Notice of Assessment from previous tax year, provincial (QC)
- 2 - Instalment payments

## For your income (as appropriate)

- 3 - Income slips ( T4 and RL-1 )
- 4 - Business or Professional income
  - Commissions received or Tips
  - ➔ If you are self-employed or have a small unincorporated business, ask for the document to know what information you require.
- 5 - Wage-loss indemnity received ( T4A )
- 6 - CNESST / WSIB ( T5007 )
- 7 - Canada Pension Plan (CPP) or Quebec pension plan (RRQ/QPP) ( T4A ( P ) )
- 8 - Old Age Security pension (OAS) T4A (OAS)
- 9 - Scholarships, RESP
- 10 - Withdrawals RRSP, RRIF, LIF ( T4RSP / T4RIF )
- 11 - Pension fund and others annuity ( T4A )
- 12 - Employment insurance ( T4E )
- 13 - Social assistance payments ( T5007 )
- 14 - Compensation from SAAQ ( T5007 / Relevé 5 )
- 15 - Taxable benefits (stock options)
- 16 - Income : Interest, Dividends, saving bonds ( T3 / T5 )
- 17 - Capital Gains or Losses ( T5008 )
- 18 - Quebec Parental Insurance Plan (QPIP) (Relevé 6)
- 19 - Prepayment (daycare expenses, bonus at work, home maintenance) ( RL19 )
- 20 - Support payments ( fill T776 )
- 21 - Real estate Rentals
- 22 -
- 23 - Ownership of foreign property which exceeds \$100,000 ( fill T1135 )
- 24 - Other income, investments : specify: \_\_\_\_\_

## For your deductions and credits (if you qualify)

- 25 - Medical, dental, glasses, etc. ( Drugstore or insurance Co statement )
  - o Travelling expenses for appointments over 40km or over 80km from your home
  - o Need a proof of the appointments for all travelling expenses
- 26 - Premium paid for hospitalization insurance outside Canada
- 27 - What is your drug coverage plan :
  - ( ) Québec prescription drug insurance plan (RAMQ)
  - ( ) Private drug insurance plan
- 28 - RRSP ( contribution )
- 29 - HBP or LLP to reimburse ( Federal Notice of Assessment )
- 30 - Charitable donations ( First time after 2007? ( ) Yes ( ) No

- 31 - Donations-in-kind (ie. Stocks or mutual funds)
- 32 - Childcare expenses RL24 or RL30 (QC)
- 33 - Summer Camp
- 34 - Babysitter receipt
- 35 - Adoption fees or infertility treatment
- 36 - Tuition fees (T2202A, RL-8, or others for yourself and/or children)
- 37 - Legal fees (initial fees, payments) for support payments
- 38 - Taxable Alimony payments paid
- 39 - First time home buyers' tax credit ( FED and QC )
- 40 - Sale of your principal residence ( see above )
- 41 - Eco-Friendly Home Renovation Tax credit
- 42 - Tax credit for the upgrading of residential waste water treatment systems
- 43 - Financial expenses and interest paid (for investment income)
- 44 - Moving Expenses
- 45 - Interest paid on a student loan
- 46 - Investments in a labor-sponsored fund
- 47 - Capital Regional et cooperatif Desjardins shares
- 48 - Property tax statement ( Tenant, RL-31 in QC )
  - ➔ Owner : registration number ... Municipal property taxes statement
- 49 - Tax credit for contributions to political parties
- 50 - Expenses related to the job ( Employed tradespersons, salaried and commission employees )
- 51 - Union or professional dues
- 52 - Tax credit for seniors' activities (70 years and over)
- 53 - Tax credit for home-support services for seniors (70 years and older)
- 54 - Home accessibility tax credit ( HATC ) ( 65 years or older )
- 55 - Seniors Assistance Tax credit (70 years and older)
- 56 - In 2020, did you work at home? ( ) yes ( ) no
  - more than 50% of the time over a period of a least four consecutive weeks in 2020 ( )yes ( ) no
- 57 - Children's artistic activities tax credit
  - o (under age 16 at beginning of the year)
- 58 - Disability tax credit ( DTC )
- 59 - Tax credit for a top-level athletes
- 60 - Tax credit for recent graduates working in remote resource regions (QC)
- 61 - Tax credit for Volunteer Firefighter or search and rescue volunteers
- 62 - Other deductions or credits, specify
- 63 - Grant for seniors to offset a municipal tax increase (QC) You can be eligible if you were resident in Quebec, were 65 years or older and had owned your residence for at least 15 consecutive years and others conditions.

If you have one child or more,  
Name, SIN, birth date  
Worked in 2020? Do we do his taxes?  
( ) yes ( ) no

**Important Notice :**

Do not separate copies of T3, T4, T5, etc. You must report your income from all sources, domestic and foreign.

You need Help ? :

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## Tax Return List – New Client

**Name(s):** \_\_\_\_\_ **DOB:** \_\_\_\_\_ **SIN:** \_\_\_\_\_  
**(1) :** \_\_\_\_\_

**(2) :** \_\_\_\_\_  
 \_\_\_\_\_

**Email Address:** \_\_\_\_\_ **Main Phone #:** \_\_\_\_\_  
 1) \_\_\_\_\_ 1) \_\_\_\_\_

2) \_\_\_\_\_ 2) \_\_\_\_\_

**Main Language:**      1) \_\_\_\_\_ 2) \_\_\_\_\_

**Marital Status:** \_\_\_\_\_ Did it change in the last Tax Return year? YES / NO

If yes, date of change: \_\_\_\_\_

**Current Address:** – is it the same as your T4? YES / NO

**If NO** (new address): \_\_\_\_\_

Current province of residence: \_\_\_\_\_ Province of residence as of December 31<sup>st</sup>: \_\_\_\_\_

Is your current address the same as last year? YES / NO

**If NO:** Date of change: \_\_\_\_\_ Previous province of residences : \_\_\_\_\_

**Did you SELL a property in the last calendar year?** YES / NO

**If YES:** Year of purchase: \_\_\_\_\_ Date of selling: \_\_\_\_\_

Purchase price: \_\_\_\_\_ Selling price: \_\_\_\_\_

Did you live in the residence for full time of ownership? YES / NO

**If NO:** Years in residence: \_\_\_\_\_ Years as a rental: \_\_\_\_\_

Ownership? SOLE / JOINT \_\_\_\_\_ Joint name : \_\_\_\_\_

Address of House Sold: \_\_\_\_\_

**RRSP Receipt(s)?** YES / NO **T2202A** for post-secondary education? YES / NO

**Medical Fees:** YES / NO Please provide a summary from the insurance company or drug store.  
 Premiums paid for insurance (if any): \$ \_\_\_\_\_

**Donations:** YES / NO **If YES;** is it the first time after 2007: YES / NO