

**Income items:**

- All information slips
(i.e. T3, T4, T4A, T4A (OAS), T4A (P), T4PS, T4E, T4RSP, T4RIF, T5, T5007, T5008)
- Investment income not reported on slips
(interest, dividends, capital gains)
- Gratuities/tips
- Investments summary
- Partnership statements
- Sale of property including shares, mutual funds, real estate
- Foreign income/pensions/investments
- Spousal support
- Other income/taxable benefits: _____

Tax Credits:

- Medical expenses
 - Medical receipts
 - Medical premiums paid to private health services plans (not paid by employer)
 - Travel for medical services (>40km)
 - Home renovations for disability/accessibility
 - Adoption/fertility expenses
- Education credits
 - Tuition receipts
 - Interest paid on a government student loan
 - Tuition transfer from child/to parent (T2202A signed by student)
- Charitable donations
- Political contributions
- Property taxes or rent paid
- First-time home buyer (statement of adjustments from lawyer)
- Children's arts/fitness receipts
- Emergency services volunteer info
- Eligible supplies as a teacher
- Disability tax credit, Canada/primary caregiver

Deductions:

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> RRSP contributions <input type="checkbox"/> Child care expenses or camp fees <input type="checkbox"/> Investment carrying charges/interest <input type="checkbox"/> Investment counsel/management fees <input type="checkbox"/> Spousal or child support <input type="checkbox"/> Moving expenses <input type="checkbox"/> Northern residence deduction | <ul style="list-style-type: none"> <input type="checkbox"/> Employment deductions <ul style="list-style-type: none"> Union/professional dues Clergy residence deduction information Employment expenses (T2200 - signed by employer) Transport company meals and lodging logbook |
|--|--|

Self Employed/Rental income

- If you own a business, rental, or farm please provide a summary of income and applicable expenses including assets purchased/sold, and business/personal use of home and auto. Forms for download are available online on our website for your convenience. If you have a GST account please include all GST correspondence for the year.
- If you operate a farm and participate in the AgriStability or AgriInvest program please provide details of income and expenses as well details on crop and livestock inventory. Fillable forms are available online to assist you if you prefer.

COVID-19:

- If you received income from one of Canada's COVID-19 benefit programs including CERB, CRB, CRSB, CRCB you will receive a T4A in the mail to claim this benefit.
- If you worked from home more than 50% of the time over a period of at least four consecutive weeks in 2020 due to COVID-19 you are now eligible to claim the home office expense deduction. A new temporary flat rate method allows you to claim a deduction of \$2 per day for each day you worked at home up to \$400. Please indicate the number of days when you submit your information. Alternatively, your employer can complete the T2200S form.
- If you were self-employed in 2020 and took advantage of any of the COVID-19 support programs (CEWS, CERS, CEBA loan, Manitoba bridge grant etc) please provide all documents relating to the program.

**If you have questions about whether or not you qualify, or what documentation is needed,
please call our office or email.**



1. Did your address, phone number, or email change in 2020? Yes No
 If yes, please provide details of changes _____

2. Did you dispose of a principal residence in 2020? Yes No
 If yes, please provide the year of acquisition, proceeds on sale and address of property: _____

3. Did your marital status change in 2020? Yes No
 If yes, circle your current status: _____
 Married / Common-Law / Widowed / Divorced / Separated / Single

4. Were there any additions or changes to dependents in 2020?
 If yes, please provide details:
 (name and birthdate) _____

5. Did you reside in Manitoba on December 31, 2020? Yes No
 If no, please indicate your province & country of residence: _____

6. Are you a Canadian citizen? Yes No
 If not, or you are a dual citizen, please indicate your status: _____

7. If you are a Canadian Citizen, do you authorize the Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada? Yes No

8. At any time in 2020, did you own non-Canadian property including shares in foreign companies (excluding vacation homes, vehicles for personal use, funds in registered foreign pension plans) with a cost greater than \$100,000? Yes No
 If yes, please provide us with a list of the property and details of any income earned from that property: _____

9. Did you spend more than 122 days in the US in any of the past three years? Yes No
 If yes, please provide the estimated number of days:
 _____ 2020 _____ 2019 _____ 2018

10. Did you work from home for more than 50% of the time over at least four months due to COVID-19?
 If yes, please provide a T2200S form signed Yes No
 by your employer or if you are using the flat-rate method the number of days: _____

11. Would you like to receive your final 2020 tax return in electronic format? Yes No
 If yes, a paper copy will not be provided. Please provide your email: _____

12. Would you like to sign-up for direct deposit? Yes No
 If yes, if you have not yet provided CRA with your banking information please enclose a VOID cheque or printout from your current bank with banking information.

Please sign below, certifying that to the best of your knowledge the above information is true and correct.

Date: _____