

Contact Information

	Taxpayer Info	Spouse/Common-law Partner Information*
Full Legal Name As registered with CRA:		
Mailing Address:		
Telephone Number:		
Email Address:		
Date of Birth:		
Social Insurance Number:		
Marital Status at December 31 st (<i>Single, Divorced, Married, Common-law, Widowed</i>)		

*If you were married or common-law *at any time in the tax year* please complete the second column, above.

Do you have any **dependents** that reside with you? If so, please provide the following for each dependent in the space below.

(Please provide information separately if you have more than 2 dependents)

	Dependent 1	Dependent 2
Full Legal Name As registered with CRA:		
Relationship to you:		
Date of Birth:		
Social Insurance Number:		
Estimated Net Income:		

2021 Tax Information Checklist

Please note any changes and upload completed form to your client portal through Verifyle or email to info@davisaccounting.ca.

Contact Information

Name: _____
Address: _____
Mobile: _____
Home: _____
Email: _____

Family Details

Marital status: _____
Dependants: _____

Did you receive or make spousal or deductible child support payments during the year? Yes No

Questions Required for Electronic Filing

Are you a Canadian Citizen? Yes No

Do you agree to Canada Revenue Agency providing your name, address, and date of birth to Elections Canada for the National Register of Electors? Yes No

Sale or Disposition of a Principal Residence or Other Real Property

Did you sell or dispose of your principal residence this year? Yes No

Did you sell or dispose of any other real property (cottage, vacation home, vacant land, etc.)? Yes No

Complete address of the property sold, including postal code (attach additional page, if required):

Year purchased: _____ Sale price: _____

Foreign Pensions

Did you receive a pension from a country other than Canada? Yes No

If yes, provide the following details for each pension received (attach additional pages, if required)

Country: _____ Amount: _____ Exempt portion: _____

Currency: _____ Start date: _____ Foreign taxes paid: _____

Tax on Split Income Requirement

Did you receive any of the following types of income from a private business, activity or profession where a related person who is resident in Canada has a significant interest or is actively involved:

1. Dividends or shareholder benefits from a private corporation Yes No
2. Partnership or Trust income from a related business Yes No
3. Rental income (including through a trust or partnership) where a related person is involved Yes No
4. Interest on loans to a private corporation, partnership or trust Yes No
5. Income or gains from the disposition of private shares or other property Yes No

2021 Supporting Documentation

Please check off the income and receipts that are applicable to you for the tax year and upload completed form to your client portal through Verifyle or send to info@davisaccounting.ca.

Notices

- Notice(s) of (re)assessment for 2020

Other Income or New Sources of Income

- First year for CPP, OAS?
- T4E for employment insurance payments
- Alimony and/or maintenance received
- Rental property revenue and expenses
- Business, self-employed income and expenses
- Details of foreign income or other pensions received (see previous page)

Receipts

- RRSP contributions and withdrawal
- Union or professional dues
- Donations
- Medical expenses, including plan premiums
- Child care
- Student loan interest
- T2202 tuition fees
- Moving expenses
- T2200 Employment expenses
- Investment expenses (interest, mgmt. fees)
- Alimony and/or maintenance paid

Slips From the Following Issuers (if applicable to 2021)

2021 T1 Foreign Property Reporting

Canadian resident individuals who held certain property outside Canada with a total cost of more than \$100,000 CAD at any time during the tax year are subject to certain disclosure requirement to the Canada Revenue Agency (CRA).

Non-compliance with this reporting requirement results in severe penalties. To help us determine whether you are subject to the reporting rule, please read and consider each of the following questions carefully when answering them.

If you owned any of the following property at any time during 2021, answer YES to the relevant questions. You may be subject to the foreign property reporting rule, and we may prepare additional forms to submit to the CRA.

1. Funds or intangible property (patents, copyrights, etc.) situated, deposited or held outside Canada Yes No
2. Tangible property situated outside of Canada Yes No
3. A share of the capital stock of a non-resident corporation held by the taxpayer or by an agent on behalf of the taxpayer Yes No
4. An interest in a non-resident trust that was acquired for consideration, other than an interest in a non-resident trust that is a foreign affiliate for the purposes of section 233.4 Yes No
5. An interest in a partnership that holds a Specified Foreign Property unless the partnership is required to file a T1135 Yes No
6. An interest in, or right with respect to, an entity that is a non-resident Yes No
7. A property that is convertible into, exchangeable for, or confers a right to acquire a property that is Specified Foreign Property Yes No
8. A debt owed by a non-resident, including government and corporate bonds, debentures, mortgages, and notes receivable Yes No
9. An interest in a foreign insurance policy Yes No
10. Precious metals, gold certificates, and futures contracts held outside Canada Yes No

Signature: _____

Date: _____

Signing date

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