



Aries Accounting

#202 - 879 Anders Road
West Kelowna, BC V1Z 1K2
Phone: 250-454-9483

Office Use Only	
Client Number	
Date Received	

2020 INCOME TAX CHECK LIST

Name: _____ Birthdate: yyyy/mm/dd _____ SIN: _____

Spouse Name: _____ Birthdate: yyyy/mm/dd _____ SIN: _____

Marital Status: Married / Single / Divorced / Separated /
Widowed / Common Law _____ Did this change in 2020? If yes, please provide date.

Address: _____

City: _____ Postal Code: _____

Primary Phone: _____ Did you move in 2020? Yes No

Email: _____ Did you work from home due to COVID-19 Yes No

Dependent Information:

Name	Birthdate	SIN	Gender
			Male <input type="checkbox"/> Female <input type="checkbox"/>
			Male <input type="checkbox"/> Female <input type="checkbox"/>
			Male <input type="checkbox"/> Female <input type="checkbox"/>

Income Sources

- | | |
|--|---|
| <input type="checkbox"/> Salaries, Commissions (T4, T4A slips) | <input type="checkbox"/> Taxable Capital Gains/Losses |
| <input type="checkbox"/> Pension Income - OAS/CPP /Other | <input type="checkbox"/> RRSP/RRIF Income (T4RSP slips) |
| <input type="checkbox"/> COVID-19 Benefits (Example CERB) | <input type="checkbox"/> WCB Benefits |
| <input type="checkbox"/> EI Benefits | <input type="checkbox"/> Self-Employed (*Add'l info required) |
| <input type="checkbox"/> Rental Income (*Add'l info required) | |
| <input type="checkbox"/> Investment Income (T3, T5 slips) | |

Deductions

- | | |
|--|---|
| <input type="checkbox"/> Childcare Expenses (Attach details) | <input type="checkbox"/> RRSP Contributions |
| <input type="checkbox"/> Teacher/Child Educator School Supply Tax Credit (Attach receipts) | <input type="checkbox"/> Union or Professional Dues |
| <input type="checkbox"/> Moving Expenses (Provide receipts and details) | <input type="checkbox"/> Employment Expenses (*Add'l info required) |
| <input type="checkbox"/> Extended Health Benefits | <input type="checkbox"/> Investment Interest/Broker Fees |
| <input type="checkbox"/> Medical & Dental Expenses | <input type="checkbox"/> Education: Tuition (T2202 Slip) |
| <input type="checkbox"/> Charitable/Political Donations (Official Receipts) | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Interest Paid on Student Loans (Attach Stmt) | |

Other Information

- 2020 Instalments paid
- Notice of Assessment from 2019 (All pages)
- Prior year tax return (if this is the first year of Aries filing your taxes)
- RRSP Home Buyer's Withdrawal (Provide details)
- First Time Home Buyer (Provide legal documents – Statement of Adjustments)
- Northern Resident Deduction (Must have lived in prescribed zone for at least 6 months)
- Did you sell your home in 2020? This must be reported to the CRA.
- Are you a Teacher or Early Childhood Educator?
- Are you 65 years of age or eligible for the DTC? Did you perform renovations on your home to enhance mobility or reduce risk of harm?

Are you a Canadian Citizen? Yes No

Do you allow our office to access your information through the CRA Represent A Client? *A form will be required to sign upon pick up.* Yes No

Do you own foreign assets worth more than \$100,000? Yes No
If yes, please provide details.

Are you a US Citizen? *If yes, you may be required to file a US tax return.* Yes No

Were you **OR** your parents born in the US? Yes No
If yes, you may be required to file a US tax return.

Would you like to receive our newsletters for tax tips and important information? Yes No

Are you registered for My Account with **CRA** or do you have a My Service Canada Account with **Service Canada**? Yes No

If no, would you like to be registered for one? If yes, please ensure you have provided a valid email address for each family member who would like to register. An email with instructions will be sent to you. Yes No

Note that our office can assist with CRA requests for information after the personal tax return is filed for additional fees.