

Use this tax saver envelope to collect all of your tax slips and receipts. Bring it back with you to us for your personal tax interview - or if you prefer, drop it off and we will call you.

Receipts, Slips and Documentation – *Warning: missed slips = tax penalty*

Please indicate any changes in 2020 below

Did you move during the year __Yes __No

New Address _____

Change in marital status (single, married, common-law separated, divorced, widowed)

Spouse's Name _____

SIN _____

Birth date _____

New dependants or children

Name _____

SIN _____

Birth date _____

If any changes

Home phone _____ Work phone _____

Cell phone _____

e-mail address _____

Banking info for Direct Deposit

Preference for client copy of return: __Paper __PDF

Income

- Canada Revenue Agency correspondence
- All information slips (T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RIF, T4RSP, T5, T10, T5008, T5018)
- INCOME FROM TIPS**
- Sale documents for real estate (please provide cost to purchase property)
- Investment gains/losses realized (if possible obtain summary from your investment advisor)
- Receipts for spousal support paid or received
- Summary of Rental income and expenses
- Miscellaneous income

Business/Farm

- Summary of Business income and expenses
- Summary of Farm income and expenses
- GST forms
- Capital asset purchase/sale documents
- Agri-1 slips and attachments
- Inventory listing
- CWB advance statements
- Canola advance statements
- Feeder association statements

Deductions

- Professional or union dues paid
- RRSP contributions
- Moving expenses
- Summary of employment expenses
- signed Declaration of conditions of employment (T2200) or (T2200S)
- Automobile and travel logbooks
- Child care expenses (including SIN of childcare provider)
- Carrying charges and interest expenses
- Stock option and shares deduction
- Northern residents deduction
- Exploration and development expenses
- Employed tradesperson tools purchased (with signed T2200)
- claiming flat rate method for working from home due to pandemic Provide __# of days worked from home

Special requests: Please do not separate slips, and do not include envelopes

Tip: organized information = less time required = smaller bill

List of slips to come:

Tax credits

- Medical expense summary and receipts
 -for prescription drugs, please provide annual detailed summary from pharmacist instead of individual receipts
 -listing of out of town medical travel
 (for a complete list of eligible expenses go to www.cra.gc.ca and search for eligible medical expenses)
- Medical expense reimbursement Insurance statements/summary
- Disability tax credit application (T2201)
- Tuition slip T2202A
- Interest paid on student loans
- Charitable donation receipts
- Political contribution receipts
- Adoption expenses
- First time home buyer (provide acquisition date)
- Digital news subscription
- Teacher's school supplies tax credit
- Home accessibility credit Renovations to enhance mobility for disabled or over 65 years of age

Other

- # days spent in the US (if over 120 days on average over the last three years)
- Are you a U.S. citizen

Name: _____

Medical Expenses

Date Paid	Name of Patient	Payment to	Description	Amount	Round trip distance (if over 40 km one way)	KM
Jan 31/20	John Doe	Dr. Magoo	Eye specialist	\$100.00	95	km

Date Paid	Name of Patient	Payment to	Description	Amount	Round trip distance (if over 40 km one way)	KM
Total						

DO NOT INCLUDE EXPENSES YOU HAVE BEEN REIMBURSED FOR.
 Please include travel for specialist appointments, medical tests and medical treatments.
 Please include payments to private health care plans and payments for out of province coverage or country extended health care.

NOTE: TO SUPPORT MEDICAL TRAVEL, CANADA REVENUE AGENCY REQUIRES:
 ~ SERVICES MUST NOT BE AVAILABLE LOCALLY
 ~ A DOCUMENT FROM A MEDICAL PRACTITIONER SUPPORTING THE TRIP OCCURRED

COVID PROCEDURES FOR OUR OFFICE FOR TAX SEASON

We request that documents for tax return preparation
be dropped off in the box provided in the front entrance of our office.

or

e-mailed to office@kjjcpa.com

or

uploaded to your client portal (call our office for registration)

Meetings are by appointment only.

We encourage telephone or video conference meetings where possible.

If meeting in person masks will be required.

Once tax returns are completed we will encourage you to sign by email, fax, or docusign

If you want to sign in person we will book an appointment for you to do so.