

## 2021 Personal Tax Checklist

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

SIN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Did your address change?  No  Yes (please provide your new address below)

Phone number: \_\_\_\_\_ Email: \_\_\_\_\_

Marital Status: If your marital status changed, please specify the date of change: \_\_\_\_\_

Single  Common-Law  Married  Separated  Divorced  Widowed

Are you a Canadian citizen? Yes  No

Would you like CRA to provide information to Elections Canada? Yes  No

Did you change your name? Yes  No

Did you receive any COVID-19 benefits? Yes  No

Have you sold your primary residence? Yes  No

Did you own non-Canadian property with a total amount of \$100,000 or more? Yes  No

Are/were you a US person (US citizen or Green Card holder)? Yes  No

Do you have a US passport? Yes  No

Did you earn employment income from the US? Yes  No

If not a US Person, did you spend more then 122 days in the US in the past 3 years? Yes  No

If yes, estimate how many days (2022\_\_\_\_\_, 2021\_\_\_\_\_, 2020\_\_\_\_\_)

If you have a spouse or common-law partner and we are not preparing their return, please provide:

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

SIN: \_\_\_\_\_ Net Income from tax return: \_\_\_\_\_

Do you have any dependents? Yes  No

Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**\*\*As per our policy, no documents will be submitted with the CRA unless payment is received in full\*\***

Payment method:  VISA  Mastercard

Name on card: \_\_\_\_\_

Credit Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ CVV: \_\_\_\_\_