

# MY 2020 INCOME TAX CHECKLIST

## RECEIPTS

- RRSP Contribution
- Child Care Expenses
- Children's Fitness and Art Programs (maximum \$500 /child QC)
- Union dues and professional fees
- Charitable Donations / Political contributions
- Digital news subscription
- Medical Expenses (obtain annual summary from your pharmacy, insurance, dentist, chiropractor, etc.)
- Adoption Expenses / Infertility treatment expenses
- Carrying charges and interest expenses
- Sales of real estate, shares, bonds
- Moving Expenses
- Support payment to ex-spouse
- Notice of Assessment of 2019 (Federal and Provincial)
- Instalments paid for 2020 (Federal and Provincial)

## OTHER DOCUMENTS (IF APPLICABLE)

- Rental income and expenses
- Declaration of condition of employment Forms signed by Employer (T2200, TP64.3)
- Employee home office expenses calculation
- Disability certificate (T2201, TP-752)
- Total expenses paid for home support services for seniors (QC resident of 70 years + only)

## SLIPS

- All your T4 employment slips or commission (T4, T4A, RL1)
- Unemployment insurance income (T4E)
- Canada Emergency Response Benefit (T4A, RL1)
- Canada Recovery Benefit (T4A, RL1)
- Social Welfare Benefits (T5007)
- Workplace Accident Benefits (T5007, RL5)
- Old Age Security Benefits (T4OAS)
- Pension and Retirement Income RPC / RRQ (T4AP, RL2)
- RRSP income (T4RSP, T4RIF)
- Post-Secondary Education Fee (T2202, RL8)
- Interest and Dividends (T3, RL16) (T5, RL3)
- Interest paid on student loans
- Rent slip received from property owner (RL31)

## SELF-EMPLOYED

- Business income and expenses
- Vehicule purchase/rental contract
- COVID-19 Financial assistance :
  - Canada Emergency Business Account loan (CEBA)
  - Canada Emergency Wage Subsidy (CEWS)
  - Canada Emergency Rent Subsidy (CERS)

## DID YOU WORK FROM HOME IN 2020 DUE TO COVID-19?

Visit the CRA [Home Office Expenses for Employees](#) page to check your eligibility for a tax deduction and calculate the amount you are entitled to.

**HELP US HELP YOU BY SENDING US YOUR DOCUMENTS AS EARLY AS MARCH 8 THIS TAX SEASON**

# HAS YOUR SITUATION CHANGED?

## MARITAL STATUS CHANGE

Date (MM/DD/YY)

- Single       Common law  
 Separated       Divorced  
 Married       Widower/widow

## LIVED ALONE THROUGHOUT THE YEAR

## SPOUSE

Name

Date of birth (MM/DD/YY)

SIN

## FIRST TIME HOME BUYER

Date (MM/DD/YY)

## NEW ADDRESS

## SALE OF PRINCIPAL RESIDENCE

Year of purchase

Sale price

## CHANGE OF USE OF YOUR PRINCIPAL RESIDENCE

- From residential to rental  
 From rental to residential

Date (MM/DD/YY)

## NEW CHILD

Name

Date of birth (JJ/MM/AA)

## ADDITIONAL DEPENDENT CHILD

Name

Date of birth (MM/DD/YY)

Net Income

## DEPENDENT CHILD IN POST-SECONDARY STUDIES

Name

Date of birth (MM/DD/YY)

Net Income

## CHILD WHO IS NO LONGER DEPENDENT

Name

Date of birth (MM/DD/YY)

End date (MM/DD/YY)

## OTHER DEPENDENTS

Name

Date of birth (MM/DD/YY)

- Father       Mother

Other

Net income

- Caregiver  
 Physical or mental disability person

## CHANGE OF THE DRUG INSURANCE

- Group insurance       RAMQ

At work

Of the spouse

Beginning date (MM/DD/YY)

End date (MM/DD/YY)

- Bankruptcy

## MY 2020 INCOME TAX CHECKLIST

# THANK YOU

THANK YOU FOR COUNTING ON US AND IT IS WITH PLEASURE THAT WE COUNT FOR YOU SINCE 1993