

# Howland Tax Services *International*



## 2020 Personal Tax Organizer (Canada)

### Personal Information

You	Your Spouse
Name	Name
Social Insurance #	Social Insurance #
Date of Birth	Date of Birth
Marital Status: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Common-Law <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed	
Address	Address (if different)
Postal Code	Postal Code
Phone	Phone
Email	Email
Canadian Citizen?	Canadian Citizen?

Did your marital status change during the year?  Yes  No

If yes, indicate change and date of change: \_\_\_\_\_

If you are married or living common-law and we are not preparing your spouse's return, please provide a complete copy (all pages) of your spouse's tax return and income tax slips.

Dependants	1	2	3	4
Name				
Date of Birth				
Relationship				
Social Insurance #				
Net Income				

Did you receive the Canada Child Benefit in 2020?  Yes  No

Did you pay childcare expenses in 2020?  Yes  No

If yes, please provide receipts and indicate the Social Insurance Numbers of individual daycare providers:

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

Did you immigrate to or emigrate from Canada during 2020?  Yes  No

If yes, indicate change of residency and date of change \_\_\_\_\_

Do you want to start or change Direct Deposit of refunds and benefits into your bank account (income tax refunds, GST/HST Credits, Canada Child Benefits)? If yes, provide the following:

Branch Number \_\_\_\_\_

Institution Number \_\_\_\_\_

Account Number \_\_\_\_\_

### COVID-19 Benefits

If you received any of the following in 2020, the amounts are taxable and should be reported to you on a tax slip (T4A, T4E or RL-1):

- Canada Emergency Response Benefit (CERB)
- Canada Emergency Student Benefit (CESB)
- Canada Recovery Benefit (CRB)
- Canada Recovery Caregiving Benefit (CRCB)
- Canada Recovery Sickness Benefit (CRSB)

Businesses that received either of the following must include the amounts in income reported on their individual, corporation, or partnership returns.

- Canada Emergency Rent Subsidy (CERS)
- Canada Emergency Wage Subsidy (CEWS)

### Employees Working at Home due to COVID-19

Did you work from home more than 50% of the time for a period of at least four consecutive weeks in 2020 due to COVID-19?  Yes  No

### Journalism Organizations

In 2020 did you pay for a digital news subscription with a qualified Canadian journalism organization, or make a donation to a registered journalism organization?  Yes  No

## Documents needed to prepare your return(s)

- New clients: provide complete copies of the last tax returns filed and the notices of assessment
- Copies of income tax slips received, including T1204, T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4RSP, T4RIF, T5, T5008, T5013, U.S. Social Security, other foreign pensions, etc.
- RRSP or PRPP contribution receipts
- Charitable donation receipts
- Receipts for contributions to federal or provincial political parties
- Employment expenses: Form T2200 is required from your employer
- First-time home buyer: did you purchase a qualifying home in 2020 using a Home Buyers' Plan withdrawal?
- Investment expense receipts (interest expense, investment counsel fees, management fees, etc.)
- Medical expenses: provide all receipts and reimbursements from medical plans
- Moving expense receipts, if the move brought you 40 kms closer to workplace or school
- Student loan interest forms
- Tradesperson tools and expenses: provide receipts
- Tuition fees if more than \$100: obtain T2202 *Tuition and Enrolment Certificate* from educational institution
- Receipts for union dues
- Firefighter or search and rescue volunteers: completed 200 hours of eligible services during the year?
- Income and expenses from rental properties, businesses or partnerships
- Documentation or details of assets acquired and sold during the year (stocks and bonds sold outside RRSP, real estate, business equipment and autos, etc.)
- Details on alimony/maintenance received or paid
- Assessment notices and correspondence received from Canada Revenue Agency
- Receipts for tax paid by installments
- The above is not a complete list. Please provide details regarding any other income or expenses items not listed above:

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## Foreign Property

Foreign property includes funds held outside Canada, shares of non-resident corporations, amounts owed to you by non-residents, interests in non-resident trusts, real property (real estate), and other property outside Canada. Did you own foreign property at any time in 2020 with a total cost of more than \$100,000 CAD?

Yes  No

If yes, please provide details:

Cost of property \_\_\_\_\_  
Type of property \_\_\_\_\_  
Location of property (country) \_\_\_\_\_

If you had foreign property costing more than \$100,000 Canada Revenue Agency must receive Form 1135 *Foreign Income Verification Statement* on or before the due date of your income tax return to avoid penalties. If your foreign property cost more than \$250,000 CAD, we will need more information to complete Form 1135.

## U.S. Citizens

Did you receive any Economic Impact Payments (EIP 1, EIP 2)? Most eligible taxpayers have received their first Economic Impact Payment. Payments of the second Economic Impact Payment started during the last week of December, with more payments occurring in early 2021.

Economic Impact Payments are not taxable on your U.S. return, but we need to know how much you received to determine if you are eligible to claim a Recovery Rebate Credit. This information can be obtained online if you have an account at [www.irs.gov](http://www.irs.gov), or by referring to the IRS letters you received with your payments.

Please indicate how much you received for:

Economic Impact Payment 1 (EIP 1): \_\_\_\_\_  
Economic Impact Payment 2 (EIP 2): \_\_\_\_\_

Did you have more than \$10,000 in Canadian financial accounts at any time during 2020 (including RRSP, RRIF, RESP, TFSA, bank, or investment accounts)? If yes, FinCEN Report 114 *Report of Foreign Bank and Financial Accounts* (FBAR) should be filed using the BSA E-Filing System by April 15, 2021. If you want us to complete and file this form for you, please provide name and addresses of financial institutions, account numbers and types, and the highest amounts in each account during 2020.

If you held Canadian financial assets in 2020, you may also have to file Form 8938 *Statement of Specified Foreign Financial Assets* or Form 8621 *Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund* with your U.S. income tax return(s).