

## Checklist

### Income Tax Return 2020

#### 1. IMPORTANT !

- |                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Federal and provincial Notice of assessment |
|--------------------------|---|

#### 2. REVENUES

- |                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Employment income – all T4 and Relevés 1 slips  |
| <input type="checkbox"/> | Any other slips – T3, T5, T4A, T4RSP, T4RIF, Relevés 2 and 3, etc.  |
| <input type="checkbox"/> | Employment Insurance – T4E  |
| <input type="checkbox"/> | Old Age Security (OAS) – T4OAS  |
| <input type="checkbox"/> | Régie des rentes du Québec (RRQ) or Canada Pension Plan (CPP) – T4AP  |
| <input type="checkbox"/> | Advance payments of tax credit for child care expenses or for home-support services for seniors – Relevé 19 |

#### 3. RECEIPTS

- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | RRSP Contributions   |
| <input type="checkbox"/> | Professional and union dues  |
| <input type="checkbox"/> | Medical and dental expenses (not reimbursed by an insurance plan)                              |
| <input type="checkbox"/> | Tuition fees – T2002A and Relevés 8  |
| <input type="checkbox"/> | Interest paid on student loans   |
| <input type="checkbox"/> | Charitable donations   |
| <input type="checkbox"/> | Political contributions  |
| <input type="checkbox"/> | Child care expenses  |
| <input type="checkbox"/> | Physical, artistic and cultural activities for children (under 18 years old)                   |
| <input type="checkbox"/> | Instalment payments to the Canada Revenue Agency (CRA) and to Agence du revenu du Québec (ARQ) |
| <input type="checkbox"/> | Information about a leased dwelling - RL-31 slip (for leaseholders)                            |
| <input type="checkbox"/> | Municipal tax bill (for home owners) for the solidarity tax credit                             |

#### 4. OTHER

- |                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Sale of principal residence in 2018 : provide year of purchase and sale price   |
| <input type="checkbox"/> | Eligible receipts for the tax credit for home-support services for seniors age 70 and over (snow removal service, housekeeping, etc) if applicable* |
| <input type="checkbox"/> | Revenues and expenses for rental income, if applicable*   |
| <input type="checkbox"/> | Revenues and expenses for self-employed worker, if applicable*  |
| <input type="checkbox"/> | Employment expenses, if applicable, and declaration of conditions of employment form – T2200 and TP64.3   |
| <input type="checkbox"/> | Any other document you deem relevant  |

\*Contact us for more information

## 5. COVID-19 – REVENUES ET SPECIAL RECEIPTS

<input type="checkbox"/>	Revenues from CERB, CRB and/or CESB – T4A and Relevé 1 slip
<input type="checkbox"/>	<p>Working from home office expenses due to COVID-19 :</p> <p><b>Simplified process (400\$ max – 2\$ for each day worked from home up to 200 days max)</b></p> <ul style="list-style-type: none"> <li>▪ T2200S signed by your employer is optional</li> </ul> <p>OR</p> <p><b>Detailed process</b></p> <ul style="list-style-type: none"> <li>▪ T2200S (Federal) <b>and</b> TP-64.3 (Qc) signed by the employer</li> <li>▪ Inclure les dépenses d'emploi admissibles – Pour les détails, cliquez sur le lien suivant :  <a href="#">Eligible Expenses Form</a></li> </ul> <p>If you are not sure which process to use, you can check out the following tool to see which one would be more beneficial for you:  <a href="#">Calculate your expenses – comparing processes</a></p>

To use our tax preparation services, here is the procedure:

Being an essential service, we are able to see you in person if no-contact procedure does not suit your needs, we have safe procedures in place. However, it is important to make an appointment ahead of time. You can contact us by phone 819-243-0433, email [info@simplicitefinanciere.ca](mailto:info@simplicitefinanciere.ca) or messaging via our facebook page <https://www.facebook.com/simplicitefinanciere>.

For the no-contact procedure, here are the different ways to leave us your tax documents :

- You can leave your documents in the secure box provided for this purpose installed outside near the back door of the building.
- You can send us your documents by email (ideally secured) to [info@simplicitefinanciere.ca](mailto:info@simplicitefinanciere.ca)

Thank you for your trust!