



235 – 11590 Cambie Rd
Richmond, BC V6X 3Z5

Azim Dahya & Company

CHARTERED PROFESSIONAL ACCOUNTANT

Dear Client,

Thank you for choosing Azim Dahya & Co., CPA as your personal tax accountants! We understand that you are trusting us with very sensitive information and your and your families finances, and we do not take that lightly.

With tax season upon us once again, it is time to begin preparing your personal income tax returns. We have provided a checklist that will assist in assembling the information required. Please use it to help get your information together so as not to miss out on any tax savings. Send the checklist along with the required documents to our office. You can mail, email, fax, courier or drop off the documents at your earliest convenience.

As you know, 2020 was a very unique year. COVID 19 changed the course of our lives and businesses and everyone has had to adapt to the new norm. This may affect your tax situation as well, especially if you received COVID 19 related benefits, so please let us know if you did. Additionally, many people now have started working from home. If you worked more than 50% of the time from home for a period of at least four consecutive weeks in 2020, please let us know. There are new tax credits for people in this situation which can save you hundreds in taxes.

The RRSP deadline for the 2020 tax year is March 1, 2021 so make sure to make any contributions you would like to before that date. You can find your RRSP contribution room on your 2019 Notice of assessment, by logging into your CRA account or by reaching out to us.

If you have any questions, concerns or would like to book an appointment with one of our tax professionals, please don't hesitate to contact us at 604-227-1120 or email us at info@advancedtax.ca.

Yours truly,

Azim Dahya & Company, CPA

2020 Canadian Tax Return Checklist

We are here not only to file your taxes – but to make sure you get every credit and deduction you can get!

Make sure to go over this list and bring all the receipts, slips and income records that apply to you.

Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Universal Child Care Benefit (RC62)
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips

Receipts

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons)
- Medical expenses
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Exams for professional certification

Other documentation

- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale or deemed sale of stocks, bonds or real estate
- Northern residents' deductions receipts
- Rental income and expense receipts
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment T2200)
- Volunteer Firefighters certification
- Search and Rescue volunteer's certification
- Custody Arrangement documentation

***If you have rental income, employment expenses or self-employed income, please see the following pages.**



#235 – 11590 Cambie Rd Richmond
O 604.227.1120 | F 604.227.1121 | TF
1.800.380.6TAX (6829)
| www.advancedtax.ca |

Personal Information

Use this page to provide us with all relevant information that might affect your tax return.

Taxpayer Info	Taxpayer 1	Taxpayer 2
First Name & Last Name		
Gender		
Social Insurance Number		
Canadian Citizen?		
Address		
Postal Code & Province		
Date of Birth (dd/mm/yyyy)		
Home Phone Number		
Cell Phone Number		
Email Address		
Marital Status on December 31, 2020:		
If your status changed in 2019, enter the date of change (dd/mm):		
Dependants Info	Dependant 1	Dependant 2
First Name & Last Name		
Social Insurance Number		
Canadian Citizen?		
Date of Birth (dd/mm/yyyy)		
Relationship to Taxpayer		
	Dependant 3	Dependant 4
First Name & Last Name		
Social Insurance Number		
Canadian Citizen?		
Date of Birth (dd/mm/yyyy)		
Relationship to Taxpayer		
General Questions		
First time filing in 2020?		
Should we provide your information to Elections Canada?		
Did you hold any foreign property with a value of over \$100,000? If so, please provide description.		
Did you sell any property in 2020 for which you are claiming a principal residence exemption?		

Questionnaire

Use this page to provide us with any updates this year that might affect your tax return.

1. Would you like us to set up direct deposit for you? If so, what is your bank details?

Branch #: _____ Institution #: _____ Account #: _____

2. Did anyone become deceased in the immediate family? If so, who was it and what date did this happen?

3. Were there any births in the immediate family? If so, what is the name, birthdate and SIN of the new dependant?

4. Did you have a change in marital status (marriage / divorce / separation)? If so, what date did this happen?

5. Did you move to a new place? If so, was it to be closer to work? Let us know the new address.

6. Did any taxpayers own or hold foreign property with a cost of over \$100,000?

7. Do you or any of your dependants have a disability? If so, are you eligible for the Disability Tax Credit? If you have not applied for it, would you like us to help you get that credit?

8. Please let us know if there is anything else we should know, including whether you sold any property (or properties) in 2020 for which you are claiming a principal residence exemption.

Employment Expense Checklist

Expenses Used to Earn Employment Income **(REQUIRES FILLED T2200)**

Employees Earning a Salary and Commission	Total Costs
Accounting / Legal Fees	
Food and Beverages	
Lodging / Hotels	
Parking	
Supplies	
Other Expenses	
Additional Items for Commission Only	Total Costs
Advertising / Promotion	
Entertainment	

Home Office Used to Earn Employment Income

Area used for business: _____ Total area of home: _____

	Total Costs
Electricity	
Heat	
Water / Utilities	
Strata	
Insurance (commission employees only)	
Property taxes (commission employees only)	
Other Expenses	

Personal Vehicle Used to Earn Employment Income

Make: _____ Model: _____ Year: _____

KM used for business: _____ Total KM driven this tax year: _____

Vehicle Owned		Vehicle Leased	
Purchase Price		Date Lease Starts	
Date of Purchase		Date Lease Ends	
Current Value		List Price	

*If we already have the above info, no need to provide it again

Vehicle Expenses	Total Costs
Fuel	
Maintenance & Repairs	
Insurance	
Licence & Registration	
Leasing Costs	
Interest Payments	

Rental Income Checklist

Property Address: _____

City: _____ Province: _____ Postal Code: _____ # of Units: _____

Are there any co-owners of this property? _____ What percentage do they own? _____

Co-owner's Information (if applicable)

First Name _____ Last Name: _____ SIN: _____

Address: _____

First Name _____ Last Name: _____ SIN: _____

Address: _____

Income

Rental Income: _____ Percentage of Personal Use: _____

Expenses

Type	Total Costs
Advertising	
Insurance	
Interest	
Office Expenses	
Legal, Accounting, and Other Professional Fees	
Management & Administration Fees	
Maintenance and Repairs	
Property Taxes	
Travel	
Utilities	
Other Expenses	

Capital Asset Additions / Dispositions

Asset Description	Date	Personal %	Total Cost

Self-Employed Checklist Page 1

Business Name: _____ GST #: _____

Type of Business (main product or service): _____

Income

Income	Net	GST/HST	PST	Total

Cost of Goods Sold (if applicable)

Opening Inventory		Subcontracts	
Purchases During the Year		Other Direct Costs	
Direct Wages		Closing Inventory	

General Expenses

Expense Type	Net	GST/HST	PST	Total
Advertising				
Meals and Entertainment				
Bad Debts				
Insurance (not home/auto)				
Interest / Bank Charges				
Taxes, Licences, Memberships				
Office Expenses				
Office Supplies				
Professional Fees (legal, accounting)				
Management & Administration				
Rent (not home office)				
Repairs & Maintenance				
Salaries, Wages and Benefits				
Property Taxes (not home office)				
Travel Expenses				
Utilities (not home office)				
Delivery / Freight / Postage				
Private Health Premiums				
Other:				
Other:				
Other:				

Self-Employed Checklist Page 2

Home Office Expenses

Area used for business: _____ Total area of home: _____

	Total Costs
Electricity	
Heat	
Water / Utilities	
Strata	
Insurance (commission employees only)	
Property taxes (commission employees only)	
Other Expenses	

Vehicle Expenses

Make: _____ Model: _____ Year: _____

KM used for business: _____ Total KM driven this tax year: _____

Vehicle Owned		Vehicle Leased	
Purchase Price		Date Lease Starts	
Date of Purchase		Date Lease Ends	
Current Value		List Price	

*If we already have the above info, no need to provide it again. If you purchased / leased a new vehicle in the past year, provide all documentation.

Vehicle Expenses	Total Costs
Fuel	
Maintenance & Repairs	
Insurance	
Licence & Registration	
Leasing Costs	
Interest Payments	
Other Expenses	

Capital Asset Additions / Dispositions

Asset Description	Date	Personal %	Total Cost