



Personal Income Tax Preparation

Use the checklist below to help you in preparation of your 2021 Personal Income Tax. Please ensure that you have collected all your tax information before you upload to the portal or drop off your information to our office.

1. Personal Information

Details of any changes in personal information/family situations in 2021 (e.g., New dependents, change in marital status, change of address, adoption costs etc.)

2. Sources of Income

Employment, Pension & Investment Income
Including: T3, T4, T4A, T4A(P), T4E, T4RIF, T4RSP, T5

If you received COVID-19 emergency or recovery benefits from CRA in 2021, you would receive a T4A or T4E slip to report the amounts on your 2021 income tax and benefits return.

For investments, please provide us with the complete tax package from your investment advisor. T3 tax receipts are not required to be mailed out until March 31, 2022 which means they will not be received by you until the first week of April.

3. Business, Professional and/or Rental Income

A summary of income and expenses, including office in home expenses, summary of car expenses, kilometers driven and business portion, if applicable.

4. Sale of your Principal Residence

Please provide us with the date of acquisition, the sale price, and the municipal address of the property.

Did you own or hold foreign property (investment/real estate) at any time in 2021 with a total cost of more than CAN \$100,000? If unsure, please call us for further information.

5. Types of Deductions/Credits

Receipts for professional dues, charitable donations, and medical bills. Please include receipts for premiums to medical insurance plans and request an annual summary from your pharmacy, chiropractor, physiotherapist etc.

Receipts for Child Care Expenses
Receipts must include name of child, SIN# and name, address, and signature of caregiver

RRSP contributions receipts

Employment Expense
A summary of car expenses, number of kilometers driven and business portion.

Tuition, Student Loan Interest, Rent
Form T2202 for tuition must be signed by the student if transferring to parent. Rental receipts or letter from landlord showing the amount of rent paid for 2021 and address of rental unit are required.

Details of any Dispositions of Capital Property (e.g., stocks, mutual funds, real estate) in 2021 including original cost and proceeds. The year-end transactions report from the investment advisor/fund company is required.

Please note: We ask that you provide your information to us no later than April 14th. If you are not already registered to our secure portal, please contact the office to get your sign in details. Access the Hall & Associates Secure Login Portal [here](#)

If you have any questions, please contact the office at 613-389-8177 or email us at info@hallcpa.ca

Hall & Associates CPA Professional Corporation
819 Norwest Road, Kingston ON K7P 2N4