

2020 Tax Year Checklist

EXISTING CLIENTS

Changes you need to know about:

- We are on a new 3-week turnaround schedule.
- Please submit your tax documents electronically (by email or fax).
- We will automatically generate PDF returns this year. Paper copies are an extra \$5.
PAPER Mail to my home (~\$3) Express Post \$20
- If you have a non-registered account at YF, please forward your taxes after April 1st 2021.
- Do you have a non-registered account outside of YF? Please provide copies of your gain/loss statement.

YOUR INFO

Your Name	Phone
Spouse Name	Spouse Phone

ANY CHANGES SINCE LAST YEAR?

Your Name	Your SIN
Spouse Name	Spouse SIN/DOB
Your Email	Spouse Email
Address for Tax Return:	

LIVING IN BC on December 31 st , 2020? Yes <input type="checkbox"/> No <input type="checkbox"/> If not, where:
MARITAL STATUS: Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Common Law <input type="checkbox"/> Date of Change [d/m/y]:
CANADIAN CITIZEN? Yes <input type="checkbox"/> No <input type="checkbox"/> SPOUSE CANADIAN CITIZEN? Yes <input type="checkbox"/> No <input type="checkbox"/>
FOREIGN PROPERTY / INVESTMENTS more than \$100,000 Canadian \$
SOLD PROPERTY? Purchase \$ _____ Sell \$ _____ # years owned: _____ # years principal residence: _____
BOUGHT PROPERTY? Yes <input type="checkbox"/> No <input type="checkbox"/> Purchase \$ _____

IF WE ARE NOT DOING YOUR SPOUSE'S TAXES

Spouse Name	2020 Estimated Earnings \$
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DEPENDENTS

Name / DOB / SIN	Name / DOB / SIN
Tuition	Tuition
Childcare Expenses	Childcare Expenses
Disability Tax Certificate? Yes <input type="checkbox"/> No <input type="checkbox"/>	Disability Tax Certificate? Yes <input type="checkbox"/> No <input type="checkbox"/>

OTHER DOCUMENTS / RECEIPTS in addition to the regular T-Slips, please provide:

Union Dues	T5008 (gain/loss)	Dec. 31 Investment Statements [gain/loss]
T2200 [employment expenses]	Commissions [NOT on T4]	Spousal Support Paid/ Received /Taxed?
T2202 (tuition receipt)	Server Tips \$	YF Checklists (Moving/Rental/Medical)
Student Loan Interest Paid	Donations	Regular T-Slips: T4, T4A, T3, T5, T4RSP, T4RIF, T4OAS, T4AP

PRICING Revised pricing listed below. Reflects investing client discount

	Investing Client	Tax Only Client		Investing Client	Tax Only
Basic Return [<i>this sheet</i>]	\$60	\$95	Foreign Income Worksheet	\$60 *	\$90 *
Medical Expenses	\$55 *	\$85 *	GST Return	\$50 *	\$70 *
Moving Expenses	\$75 *	\$120 *	Other Forms	TBD	TBD *
Rental Income	\$140 *	\$220 *	Extra Time (per hour)	\$200 *	\$220 *
Business Income	\$240 *	\$330 *	USA Tax Doc's Prep Fee \$50		
Employment Expenses	\$120 *	\$170 *	<i>* We may charge more if complex + if no worksheets</i>		
Capital Gains	\$90 *	\$120 *	We accept: e-transfers, credit, cheques		

3-week turnaround: Your return will be completed by April 30th provided we have all required information at least 3 weeks prior.