



It will soon be time to prepare your 2021 tax return. Providing complete and accurate information will allow us to prepare your tax return timely and efficiently. With this in mind, we have attached a checklist and questionnaire to assist you gathering the required items.

### **Your 2021 Tax Information**

Please review the attached checklist, note any changes and check the items you are including.

### **Mandatory Electronic Filing**

The CRA requires approved tax preparers to file tax returns electronically. To comply with this new rule, your tax return will be transmitted to the Canada Revenue Agency (CRA). Please answer the related questions on the checklist.

### **Principal Residence Reporting**

All taxpayers who sell their home must report the sale on their tax return, even if it was their principal residence for the whole time they owned it. There are substantial penalties for not reporting the sale. If you sold your home in 2021, provide the details on the attached questionnaire.

### **Foreign Property Disclosure**

Canadian resident individuals who held property outside Canada with a total cost of more than \$100,000 CAD at any time in the tax year must comply with special reporting to the CRA. There are substantial penalties for non-compliance.

### **Important Dates to Remember**

March 1, 2022	Final date for 2021 RRSP contributions
March 15, 2022	Payment due date for 1st quarterly 2021 tax instalment
May 2, 2022	Due date for 2021 income tax return due and payment of taxes owing
June 15, 2022	Filing due date for 2021 income tax return due for self-employed individuals

If you have any questions, please phone us at (204) 320-9738 (Steinbach) or (204) 272-6085 (Winnipeg).

Sincerely,  
Progressive Tax Services Inc.

# 2021 Tax Information Checklist

## Family information

Has your marital status changed?  Yes  No

Are there any changes to your dependants?  
(provide SIN, name and birth date)  Yes  No

## Questions required for electronic filing

Are you a Canadian Citizen?  Yes  No

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

## Principal residence reporting

Complete address of the home sold (including postal code): \_\_\_\_\_ Year purchased \_\_\_\_\_  
Sale price \_\_\_\_\_

## Income Sources

- First year for CPP, OAS?
- T4E for employment insurance payments
- Alimony and/or maintenance received
- Rental property revenue and expenses
- Business, self-employed income and expenses

## Receipts

- RRSP contributions and withdrawal
- Union or professional dues
- Donations
- Medical expenses, including health plan premiums
- Pharmacy printout - year end
- Child care
- Student loan interest
- T2202 tuition fees
- Moving expenses
- Property tax statement or rental receipts
- T2200 Employment expenses
- Investment statements - monthly, quarterly, yearly
- Investment expenses (interest, management fees)
- Alimony and/or maintenance paid

Please bring in your supporting documents and completed form for your tax appointment.