

# 2020 Tax Package

Tax Season Checklist

Prepared at Simplekeeper



[www.simplekeeper.ca/2020](http://www.simplekeeper.ca/2020)

[2020@simplekeeper.ca](mailto:2020@simplekeeper.ca)

(514) 308-0136

# Welcome to your 2020 package

In order to expedite your tax package before the deadline of April 30, 2021, please upload all relevant documents for the 2020 tax season via the link sent to your email or via hard copy by mail at:

**Attn: Alicia Barchechat**

Suite 213, 5555 Westminster,  
Cote-Saint-Luc, Quebec,  
H4W2J2

For drop-offs, kindly send email to:

*[dyan@simplekeeper.ca](mailto:dyan@simplekeeper.ca)*

or call us at **(514) 308-0136**

before coming to our office.

**Notable Dates For 2020 Season**

- March 1st 2021: Tax Season Begins
- April 30th 2021: Filing Deadline for Individuals
- June 15th 2021: Filing Deadline for Self-Employed Individuals
- April 30th 2021: GST/QST Deadline
- April 30th 2021: Tax Payment Deadline
- April 30th 2022: Payment Deadline for those who Received Assistance for COVID-19 and had less than \$75 000 of taxable income

## COVID-19 CHANGES

Did you receive a T2200S from your employer? Please ensure to itemize expenses per category so as to allow us to enter them on your return.

### **Need to book a call with us?**

Send your request to **[2020@simplekeeper.ca](mailto:2020@simplekeeper.ca)**



All documents must be received  
by or before **Thursday April 1st  
2021** to ensure your return is filed  
before the deadline of April 30  
2021.

Please send us all of the applicable documents below

| Item   | Applicable? | Sent? |
|--|-------------|-------|
| Employment Income – T4/RL-1                        |             |       |
| Trust Income – T3/RL-16                            |             |       |
| Investment Income – T5/RL-3                        |             |       |
| Old Age Security – T4A OAS / RL-2                  |             |       |
| QPP Benefits – T4A(P) / RL-2                       |             |       |
| Commissions / Business – T4A                       |             |       |
| RRSP / RRIF Income – T4RSP / T4RIF / RL-2          |             |       |
| Employment Insurance Benefits – T4E / RL-6         |             |       |
| CERB / CESB/ CRB Income due to Covid-19 - T4A/RL1  |             |       |
| RRSP Contribution Slips                            |             |       |
| Childcare Expenses – RL-24 / RL-30                 |             |       |
| Donation Receipts / Medical Expenses               |             |       |
| Annual Union Dues                                  |             |       |
| Tuition / Textbook Fees – T2202 / RL-8             |             |       |
| Information About Eligible Dwellings - RL-31       |             |       |
| Other Benefits & Compensations – T5007 / RL-5      |             |       |
| Statement of security transactions - T5008 / RL-18 |             |       |
| 2019 Provincial & Federal Notices of Assessment    |             |       |
| 2019 Income tax return (New clients only)          |             |       |

**Rental, Self employment & Uber Income:** See below sections

# Self Employment Income

Please send us all of the applicable documents below

| Income  | Sent? |
|---|-------|
| Professional / Business Income – <i>per month</i> |       |

| Deductible Expenses           | Applicable? | Sent? |
|-------------------------------|-------------|-------|
| Purchases                     |             |       |
| Advertising                   |             |       |
| Meals & Entertainment         |             |       |
| Insurance                     |             |       |
| Interest                      |             |       |
| Licenses                      |             |       |
| Memberships                   |             |       |
| Office Expenses               |             |       |
| Office Supplies               |             |       |
| Professional Fees             |             |       |
| Rent                          |             |       |
| Salaries & Wages              |             |       |
| Taxes                         |             |       |
| Travel Expenses               |             |       |
| Utilities                     |             |       |
| Motor Vehicle Expenses        |             |       |
| Business Use of Home Expenses |             |       |

## Rental Income

Please send us all of the applicable documents below

| <b>Per Rental Property</b> | <b>Sent?</b> |
|----------------------------|--------------|
| Address                    |              |
| Income <i>per month</i>    |              |

| <b>Deductible Expenses (per rental property, per month)</b> | <b>Applicable?</b> | <b>Sent?</b> |
|---|--------------------|--------------|
| Advertising   |                    |              |
| Insurance   |                    |              |
| Interest  |                    |              |
| Office Expenses   |                    |              |
| Professional Fees   |                    |              |
| Management Fees   |                    |              |
| Maintenance & Repairs (incl. Renovations)                   |                    |              |
| Property Taxes  |                    |              |
| Travel Expenses   |                    |              |
| Utilities   |                    |              |
| Purchase of Appliances                                      |                    |              |

## Uber / Uber Eats Income

Please send us all of the applicable documents below

| <b>Uber Tax Summary</b>   | <b>Sent?</b> |
|---|--------------|
| Uber Tax Summary - <i>shows details for revenues and charges for 2020</i> |              |

| <b>GST / QST Form</b>                                    | <b>Sent?</b> |
|--|--------------|
| GST / QST Form - <i>sent by mail from Revenue Quebec</i> |              |

| <b>Motor Vehicle</b>   | <b>Sent?</b> |
|--|--------------|
| Vehicle make, model, year  |              |
| Purchase / lease agreement   |              |
| Total number of kilometers driven in 2020                                |              |
| Total number of kilometers driven in 2020 for income purposes (ex. Uber) |              |

| <b>Deductible Expenses</b>  | <b>Sent?</b> |
|---|--------------|
| Gas & Oil   |              |
| Parking   |              |
| Insurance   |              |
| License & Registration  |              |
| Maintenance & Repairs   |              |
| Interest  |              |
| Lease Cost  |              |
| Purchase of Props For Vehicle (ex. water bottles, chargers, fans, etc.) |              |
| Advertising   |              |
| Telephone   |              |
| Insurance Deductible Following An Accident                              |              |

## Partnerships

Simplekeeper often collaborates with various professionals in the service world to serve you better. Our partners for the 2020 year can be found below. We are happy to make an introduction at any time.

| Profession                                    | Contact person   | Contact information         |
|---|--|-----------------------------|
| Corporate Lawyer                              | Helene Asseraf,<br><i>Fortier D'amour Goyette</i>      | hasseraf@fodago.ca          |
| Financial Advisor                             | Alexandre Fyon,<br><i>Fyon Financial</i>               | alex@fyonfinancial.com      |
| Commercial Insurance Broker                   | Yedidya Moryoussef,<br><i>Assuruni</i>                 | y-e.moryoussef@assuruni.com |
| Personal Insurance Broker                     | Simon Cohen,<br><i>Racine Chamberland</i>              | info@asksimon.ca            |
| Notary and Title Attorney                     | Laurence Acoca,<br><i>Acoca Notaires</i>               | laurence.acoca@notarius.net |
| Commercial and Residential Real Estate Broker | Ofir Levy,<br><i>Groupe Sutton Immobilia</i>           | ofirlevy@sutton.com         |
| Property Manager                              | Ouri Suissa,<br><i>Akelius</i>                         | ourisuissa@gmail.com        |
| Wealth Management Broker                      | Aviad Teboul,<br><i>SFL</i>                            | avraham-aviad.teboul@sfl.ca |
| Residential Real Estate Broker                | Remy Achache,<br><i>L'expert Immobilier</i>            | remycourtierimmo@gmail.com  |
| Corporate Financing for SMB                   | Charles Barchechath,<br><i>Groupe Conseil Larouche</i> | cbarchechath@videotron.ca   |
| Financial Advisor and Wealth Manager          | Philippe Mamane,<br><i>Assante</i>                     | pmamane@assante.com         |