

Personal Income Tax Checklist

ALBERTA TAX SERVICE LTD.

Please use the checklist below to make sure you have included all the documents for your taxes:

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| <ul style="list-style-type: none">✓ CRA:<ul style="list-style-type: none">○ Instalment Payments
✓ Employment Income:<ul style="list-style-type: none">○ T4○ T4A○ T4PS
✓ Employment Expenses:<ul style="list-style-type: none">○ T2200 plus a list of the expenses
✓ Pension Income:<ul style="list-style-type: none">○ T4A○ T4AOAS○ T4AP○ T4RIF○ T4RSP
✓ Investment Income:<ul style="list-style-type: none">○ T3○ T5○ T5008○ T5013
✓ Capital Gains:<ul style="list-style-type: none">○ T5013○ Trading summaries from Brokers○ Annual statement from Mutual Funds
✓ Sale of Principal Residence:<ul style="list-style-type: none">○ Address, year of acquisition & proceeds of disposition
✓ Foreign Property over \$100,000:<ul style="list-style-type: none">○ Provide details | <ul style="list-style-type: none">✓ Other Income:<ul style="list-style-type: none">○ Rental income and expense information○ Self-Employment income and expense information○ COVID-19 benefits
✓ Deductions and Credits:<ul style="list-style-type: none">○ RRSP (must be official receipts)○ Childcare receipts○ Support payment information○ Disability deduction○ Caregiver/disability amount○ Moving expenses○ Tuition fees – T2202/2202A○ Student Loan Interest slips○ Union/Professional dues○ Donations and Political Contributions (must be official receipts)○ Medical Receipts <i>less any reimbursements from Insurance</i> (for Prescriptions, please have your pharmacist print out an annual statement PLEASE NOTE: massage is NOT an eligible medical expense in Alberta)○ Premiums paid to Private/Travel Medical Insurance plans○ Working days from home due to COVID19○ Digital news subscription (must be official receipts)○ School supply credit (eligible educators only) |
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