



Alberta Personal Tax Checklist

Some personal tax items that may be applicable to you:

EMPLOYMENT INCOME

- T4 - Employment
- T4PS - Profit Sharing Plan
- T4E - Unemployment Benefit
- T5007 - WCB Benefits
- T2200 - Conditions of Employment
- Employment Expenses*
- Union Dues

PENSIONER(S)

- T4A (P) - Canada Pension Plan
- T4A (OAS) - Old Age Security
- T4A - Other Income and Pensions
- T4RIF - RRIF Income
- T5007 - Social Assistance

INVESTMENT INCOME, EXPENSES & DEDUCTIONS

- T3 - Investments, Banks, Mutual Funds
- T5 - Dividends & Interest Income
- T4RSP - RRSP Income
- T5013 - Partnership Income
- T5008 - Sale of Securities
- Brokers Summary Statement of Activity
- Cost Base of any Securities Sold
- Income from Foreign Property
- RRSP Contributions
- RRSP Home Buyers Loan Repayment
- Interest on Investment Loans

BUSINESS & PROPERTY INCOME/EXPENSES

- Business Income & Expenses*
- Farm Income & Expenses*
- Rental Income & Expenses*
- List of Assets Purchased & Sold**
- Date Started or Ceased Operations
- T5018 Income as Subcontractor
- GST Return (to be completed by Zenally)
- GST Return (completed by yourself)

OTHER

- Child Care Expenses**
- T2202 Tuition Paid
- Statement of Student Loan Interest Paid
- Donation Receipts**
- Political Contribution Receipts**
- Medical Expenses**
- Moving Expenses**

ANY CHANGES IN THE YEAR:

- Name, address or phone number
- Marital status or dependants,
- Disability status

* Detailed schedule summarizing the income/expenses is required

** Receipts required