

3D TAX CHECKLIST

Please have all the receipts and income slips available in your file. These are not submitted to CRA unless requested or selected for review.

Slips

- ☐ T4 slips (Employment income)
- ☐ Employment insurance benefits (TAE)
- ☐ Interest, dividends, mutual funds (T3, T5, T5008)
- ☐ Tuition / education receipts (T2202A)
- ☐ Old Age Security and CPP benefits (TAA-OAS, T4AP)
- ☐ Other pensions and annuities (T4AJ)
- ☐ Social assistance payments (T5007)
- ☐ Workers' compensation benefits (T5007)

Receipts

- ☐ RRSP contribution receipts (includes first 60 days of 2025)
- ☐ Tuition Receipts (T2202)
- ☐ Support for a child, spouse or common-law partner
- ☐ Professional or union dues
- ☐ Tool expenses
(Tradespersons & apprentice mechanics)
- ☐ Other employment expenses
- ☐ Teacher's school supplies
- ☐ Medical expenses
- ☐ Home renovations (seniors and disabled)
- ☐ Charitable donations
- ☐ Political contributions
- ☐ Child care expenses
- ☐ Adoption expenses
- ☐ Rent/Property tax

Receipts (continued)

- ☐ Moving expenses (must be 40KM closer to new place of work to claim)
- ☐ Interest paid on student loans
- ☐ Carrying charges and interest expenses
- ☐ Office - in-home expenses
- ☐ Exam fee for professional certification/ membership renewal fee

Other Documentation - as needed

- ☐ Notice of Assessment/Reassessment
- ☐ Canada Revenue Agency correspondence
- ☐ Sale of principal residence
- ☐ Rental income and expense receipts
- ☐ Business income/expenses
- ☐ Automobile / Travel logbook and expenses
- ☐ Declaration of Conditions of Employment (T2200)
- ☐ Home Purchase Agreement for First Time Home Buyer

3D Tax and Bookkeeping Services

(647)294-4304

3dtaxservices23@gmail.com