



## 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 2026)
- 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

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