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### US Personal Income Tax Return Checklist

Name: \_\_\_\_\_

Spouse: \_\_\_\_\_

SSN or ITIN Number \_\_\_\_\_

SSN or ITIN Number: \_\_\_\_\_

DOB: \_\_\_\_\_

DOB: \_\_\_\_\_

Occupation: \_\_\_\_\_

Occupation: \_\_\_\_\_

Arrived in Canada: \_\_\_\_\_

Arrived in Canada: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Permanent Residence Address: \_\_\_\_\_

Citizenship status (US, Dual, Canadian, or Landed Immigrant in Canada): \_\_\_\_\_

Marital status as of December 31, 2024: \_\_\_\_\_

Days in US (for Permit Holders and Non-US Citizens): 2024 \_\_\_\_\_ 2023 \_\_\_\_\_ 2022 \_\_\_\_\_

#### Slips & Receipts

(Official receipts required)

#### **All US & some Canadian slips are required**

- |  |                                      |  |
|--|--------------------------------------|--|
| <input type="checkbox"/> 1099-R  | <input type="checkbox"/> 8288-A      | <input type="checkbox"/> US Rental Income and Expenses along with property address(es)   |
| <input type="checkbox"/> 1099-Interest   | <input type="checkbox"/> 8288-Copy B | <input type="checkbox"/> For US citizens; Names, social security number, and birthdate of children under the age of 17 as at December 31, 2024 living with you |
| <input type="checkbox"/> 1099-Misc   | <input type="checkbox"/> W2's        | <input type="checkbox"/> US Rental Income and Expenses along with property address(es)   |
| <input type="checkbox"/> 1099-Social Security  | <input type="checkbox"/> T4's        | <input type="checkbox"/> US Sourced Income and Expenses  |
| <input type="checkbox"/> 1042-S  | <input type="checkbox"/> T5's        | <input type="checkbox"/> Alimony (or spousal support) paid or received and payor or recipient social security number   |
| <input type="checkbox"/> 2024 Canadian Tax Return including taxes paid   | <input type="checkbox"/> T3's        | <input type="checkbox"/> Medical expense receipts  |
| <input type="checkbox"/> Amount of stimulus payments received of \$1,400USD in 2021, \$600USD, and \$1,200USD in 2020  | <input type="checkbox"/> T4A's       | <input type="checkbox"/> Charitable donation receipts  |
| <input type="checkbox"/> 2023 US Tax Return  |                                      | <input type="checkbox"/> Purchase and sale documents of any US property sold   |
| <input type="checkbox"/> Details of any installments made to IRS   |                                      | <input type="checkbox"/> Details, expiry, and type of US working permit  |
| <input type="checkbox"/> For US citizens; Foreign Bank Account Reporting (FBAR). Details of all investment and bank accounts highest amounts held outside of the United States if exceeded aggregate of \$10,000USD at ANYTIME during the year in the aggregate. (SeFBAR Form) |                                      | <input type="checkbox"/> Date of purchase, or rental of current residence for US citizens _____  |

#### **US Citizen Shareholders (over 10% Interest) of Canadian Privately Controlled Corporations**

- ☐ Details of Canadian company financial statements for latest fiscal period if shares are owned by US citizen
- ☐ Number and Type of Shares in Canadian company owned by US citizen
- ☐ Incorporation date and place of business of Canadian Company owned by US citizen
- ☐ Company cash, accounts receivable, and investment balance as of December 31, 2015, December 31, 2016, November 2, 2017, and December 31, 2017, for Canadian company owned by US citizen
- ☐ Canadian company owned by US citizen corporate taxes paid from 1986 to December 31, 2017

#### **Tips To Help Minimize Your Professional Fees**

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Bring everything in <u>one</u> package and keep staples at a minimum | <input type="checkbox"/> Come in early <b>AFTER YOU RECEIVED ALL YOUR SLIPS AND YOUR CANADIAN RETURN IF NECESSARY</b> | <input type="checkbox"/> Do not separate slips |
|---|---|--|