U.S. Personal Income Tax Return Checklist

Cameron · Izard · Snell
CHARTERED PROFESSIONAL ACCOUNTANTS

Taxpayer Name:	Spouse Name:
Date of Birth:	Date of Birth:
Email:	Email
Phone: Cell	Phone: Cell
Phone: Other	Phone: Other
Address:	Children Date of Birth.
Marital Status:	

REQUIRED INFORMATION: Please check all applicable and attach related information (If CIS prepares you Canadian tax return, please also complete the "Canadian Personal Tax Return Checklist")	
All Filers:	**Attached √**
Format type requested for your copy of the US tax return: ☐ PDF ☐ Paper	
US tax information slips (i.e. W-2, US Social Security, 1099, K-1, 1042-S): Canadian tax information slips (i.e. T3, T4, T5)	
Rental property also used personally: # of days rented __________AND # of days used personally ___________	
US & Canadian charitable donations, with receipts	
Paid any US Federal or State income tax payments: date and amount	
Do you have a ROTH IRA? YES NO Balance at December 31, 2018_____________________________	
New Clients: copy of the prior year's US Federal and State income tax returns	
1040 Filers:	
Stock sales: detailed brokers statements or other documentation reporting the specific dates of purchase and sale	
December 2018 broker statement reporting the specific details of each investment held	
Tax Free Savings Account ("TFSA") and Registered Education Savings Plan ("RESP") accounts: activity statements detailing income earned	
Mortgage interest (including Canadian property) noting if from line of credit or mortgage If new in 2018, is debt greater than $750,000US?	
Property taxes (for US property only)	
Financial accounts held outside of the US – see FBAR 2018 excel spreadsheet on our website at: www.cistax.ca	
Pension and other employee plans of which you are a beneficiary: Plan name & value at Dec. 31, 2018 (where available),	

not including Canada Pension Plan ("CPP")" or Old Age Security ("OAS")	
Holdings of Cdn private company shares, Cdn financial instruments (i.e. loans or mortgages), Cdn trusts, or Cdn insurance policies that have a cash value (i.e. whole life insurance) – Investment Name & Value at Dec. 31, 2018	
Gifts *made* during the year if greater than $15,000 and gifts or bequests *received* in the year if greater than $100,000 – list details	
1040NR Filers:	
US source income and expense information or schedule (i.e. rental income and expenses)	
Purchase or disposal of any assets located in the US	
Specific dates for each US filer spent anywhere in the US, for any purpose (including vacation) in 2018	
Total number of days spent in the US for each of 2017 & 2016 for each US filer (if not provided in prior years)	
Other Information:	

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