U.S. Citizen & Resident (1040) Personal Income Tax Return Checklist 2019

Cameron · Izard · Snell LLP
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's Names & Birthdates:
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")**	**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, 2019____________________________	
Stock sales: detailed brokers statements or other documentation reporting the specific dates of purchase and sale	
December 2019 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 or 2019, is debt greater than $750,000US?)	
Property taxes (for US property only)	
Financial accounts held outside of the US – see FBAR 2019 excel spreadsheet on our website at: www.cistax.ca	
At any time during 2019, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency? If yes, attach details	
Non U.S. Pension and other employee plans of which you are a beneficiary: Plan name & value at Dec. 31, 2019 (if known) not including Canada Pension Plan ("CPP")" or Old Age Security ("OAS"). – see FBAR 2019 excel spreadsheet on our website at: www.cistax.ca	
Holdings of non U.S. private company shares, non U.S. financial instruments (i.e. loans or mortgages), trusts, or insurance policies that have a cash value (i.e. whole life insurance) – Investment Name & Value at Dec. 31, 2019	
Did you make any gifts during the year over $15,000 or receive any gifts or bequests greater than $100,000?	
For New Clients: Copy of the prior year's US Federal and State income tax returns	

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