

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 your Canadian tax return, please also complete the "Canadian Personal Tax Return Checklist")	Attached <input checked="" type="checkbox"/>
Format type requested for your copy of the US tax return: <input type="checkbox"/> PDF <input type="checkbox"/> 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 _____	
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 <u>dates</u> for each US filer spent anywhere in the US, for any purpose (including vacation) in 2019	
Total number of days spent in the US for each of 2018 & 2017 for each US filer (if not provided in prior years)	
For New Clients: Copy of the prior year's US Federal and State income tax returns	

Other Information: