

U.S. Non-Citizen & Non-Resident (1040NR) Personal Income Tax Return Checklist 2020

Taxpayer Name:	Spouses 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 your Canadian tax return, please also complete the "Canadian Personal Tax Return Checklist")	Attached
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)	<input type="checkbox"/>
Rental property also used personally: # of days rented _____ AND # of days used personally _____	<input type="checkbox"/>
US & Canadian charitable donations, with receipts	<input type="checkbox"/>
Paid any US Federal or State income tax payments: date and amount	<input type="checkbox"/>
Do you have a ROTH IRA? YES NO Balance at December 31,2020 _____	<input type="checkbox"/>
US source income and expense information or schedule (i.e. rental income and expenses)	<input type="checkbox"/>
Purchase or disposal of any assets located in the US	<input type="checkbox"/>
Specific dates for each US filer who went anywhere in the US, for any purpose (including vacation) in 2020	<input type="checkbox"/>
Total number of days spent in the US for each of 2019 & 2018 for each US filer (if not provided in prior years)	<input type="checkbox"/>
For New Clients: Copy of the prior year's US Federal and State income tax returns	<input type="checkbox"/>

Please add Additional Information