

U.S. Non-Citizen & Non-Resident (1040NR) Personal Income Tax Return Checklist 2022

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 your Canadian tax return, please also complete the "Canadian Personal Tax Return Checklist")	<i>Attached</i>
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, SSA-1099, 1099, K-1, 1042-S) We require a copy of your social security slip to claim a 15% deduction in Canada 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"/>
Did you make any US Federal or State tax payments? Please provide copies of the cheques or other proof of payment	<input type="checkbox"/>
Do you have a ROTH IRA? YES NO If yes, did you contribute during the year? YES NO	<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 2022	<input type="checkbox"/>
Total number of days spent in the US for each of 2021 & 2020 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