



CHARTERED PROFESSIONAL ACCOUNTANTS

U.S. Personal Tax Checklist

Please submit all of the following information.

- ☐ Canadian personal income tax returns (if we do not prepare them)
- ☐ Citizenship
- ☐ U.S. ID# (SS# or ITIN) for taxpayer, spouse and dependents
- ☐ Residency
- ☐ Marital status
- ☐ Dependents
- ☐ Property taxes paid on your principal residence during the tax year
- ☐ Mortgage interest paid on your principal residence during the tax year
- ☐ Charitable contributions (a list)
- ☐ Employee business expenses
- ☐ Pension, RSP, and TFSA account information including:
 - Name and address of financial institution that holds the account
 - Account number
 - Balance at year end
- ☐ Canadian bank account information
 - Name and address of financial institution that holds the account
 - Account number
 - Highest balance during the year
 - Type of account (chequing, savings, other)
- ☐ Earnings within Tax Free Savings Account (TFSA)
- ☐ All U.S. source income and deductions
- ☐ Details of any investments in Bitcoin

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