

# U.S. Personal Tax CHECKLIST

## PLEASE SUBMIT 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