

## U.S. Non-Resident Personal Tax Return Checklist

To help you assemble your financial information for the preparation of your U.S Non-resident Personal Tax Return, please keep this checklist handy. The checklist should be completed and returned to us together with the financial information assembled.



Personal Information	Spouse Information (If Applicable)
Name: _____	Name of Spouse: _____
SSN/ITIN: _____	SSN/ITIN _____
Date of Birth: ____ / ____ / ____ (MM/DD/YY)	Date of Birth: ____ / ____ / ____ (MM/DD/YY)
Home Phone #: _____	Home Phone #: _____
Cell Phone #: _____	Cell Phone #: _____
E-mail: _____	E-mail: _____
Address: _____	Address: _____
City: _____	City: _____
Province/State: _____ Zip Code: _____	Province/State: _____ Zip Code: _____
P.O. Box: _____	P.O. Box: _____
Country: <input type="radio"/> _____ <input type="radio"/> _____ <input type="radio"/> _____	Country: <input type="radio"/> _____ <input type="radio"/> _____ <input type="radio"/> _____

**Marital Status:**  Single  Married  Common-Law  Separated  Divorced  Widowed

Did your marital status change from last year's tax return?  Yes *Date status changed:*  No  
 MM DD YY

Are we preparing a tax return for your spouse?  Yes  No  N/A

**Please list all dependents below:**

Name	Relationship	Birthday (MM/DD/YY)	SSN/ITIN #	Net Income During Year
_____	_____	____ / ____ / ____	_____	\$ _____
_____	_____	____ / ____ / ____	_____	\$ _____
_____	_____	____ / ____ / ____	_____	\$ _____
_____	_____	____ / ____ / ____	_____	\$ _____
_____	_____	____ / ____ / ____	_____	\$ _____

Number of days spent in U.S. in 2023: \_\_\_\_\_ days

Number of days spent in U.S. in 2024: \_\_\_\_\_ days

Number of days spent in U.S. in 2025: \_\_\_\_\_ days

List all the dates you entered and left the United States during 2025 below:

Date entered United States (MM/DD/YY)	Date departed United States (MM/DD/YY)	Date entered United States (MM/DD/YY)	Date departed United States (MM/DD/YY)
____/____/____	____/____/____	____/____/____	____/____/____
____/____/____	____/____/____	____/____/____	____/____/____
____/____/____	____/____/____	____/____/____	____/____/____
____/____/____	____/____/____	____/____/____	____/____/____

Did you receive a compensation of more than \$250,000 in 2025?:  Yes  No  N/A

Did you receive any other U.S. income in 2025?:  Yes  No  N/A

Have you ever filed a U.S. Tax Return?:  Yes  No  N/A

Did you file a U.S. income tax return for any prior year?:  Yes  No  N/A

If "yes", give the latest year and form number you filed: \_\_\_\_\_

Please specify the type of income received in 2025: \_\_\_\_\_

## Rental Property

### Includes the Statement of Adjustments for purchase

Please indicate if you are the sole owner of the property or if you have a co-owner:

I'm the sole owner  I have a co-owner

If you have a co-owner, please provide their details below:

Name: \_\_\_\_\_

SSN #: \_\_\_\_\_ owned: \_\_\_\_%

Date Rental Started (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Date of Purchase (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province/State: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Total rental income ..... \$ \_\_\_\_\_

### Expenses (Total Annual Amount)

Advertising ..... \$ \_\_\_\_\_

Insurance ..... \$ \_\_\_\_\_

Mortgage Interest ..... \$ \_\_\_\_\_

Office expenses ..... \$ \_\_\_\_\_

Legal, accounting & other professional fees \$ \_\_\_\_\_

Management & administration fees ..... \$ \_\_\_\_\_

Repairs and maintenance ..... \$ \_\_\_\_\_

Salaries, wages & benefits ..... \$ \_\_\_\_\_

Property taxes ..... \$ \_\_\_\_\_

Travel ..... \$ \_\_\_\_\_

Utilities ..... \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

Major renovations & purchases (i.e. appliances):

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

## Other Important Matters

Do you want your tax refund (if any) deposited directly to your bank account?:  Yes  No

If "yes", please provide the following details of a U.S. bank account.

1. Routing #: \_\_\_\_\_

2. Account #: \_\_\_\_\_

3. Account Type:  Saving  Chequing

## Notes