Cameron • Izard • Snell LLP
CHARTERED PROFESSIONAL ACCOUNTANTS

US Non-Citizen & Non-Resident (1040NR) Personal Income Tax Return Checklist 2023

Taxpayer Name:	Spouse's 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 ☐ PDF ☐ 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)	☐
Rental property also used personally: # of days rented AND # of days used personally	☐
US and Canadian charitable donations, with receipts	☐
Did you make any US federal or state tax payments? Please provide copies of the cheques or other proof of payment	☐
Do you have a ROTH IRA? YES ☐ NO ☐ If yes, did you contribute during the year? YES ☐ NO ☐	☐
US source income and expense information or schedule (i.e. rental income and expenses)	☐
Purchase or disposal of any assets located in the US	☐
Specific **dates** for each US filer who went anywhere in the US, for any purpose (including vacation) in 2023	☐
Total number of days spent in the US for each of 2021 & 2022 for each US filer (if not provided in prior years)	☐
For New Clients: Copy of the prior year's US federal and state income tax returns	☐

Please add Additional Information

Last updated 23Jan24

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