



US Non-Citizen & Non-Resident (1040NR) Personal Income Tax Return Checklist 2024

Taxpayer Name:	Spouse's Name:
Date of Birth:	Date of Birth:
Email:	Email:
Phone – Cell:	Phone – Cell:
Phone – Other:	Phone – Other:
Marital Status:	
Address:	

REQUIRED INFORMATION: Please check all applicable and attach related information (If we prepare your Canadian tax return, also complete the "Canadian Personal Tax Return Checklist")	Attached
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)	
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 2024	
Total number of days spent in the US for each of 2022 & 2023 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