



## US Non-Citizen & Non-Resident (1040NR) Personal Income Tax Return Checklist 2025

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

<b>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")</b>	<b>Attached</b>
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. If real estate, please provide the purchase document, sale documents (including 8288 forms), and a summary of all significant improvements done over the years.	
Specific <b>dates</b> for each US filer who went anywhere in the US, for any purpose (including vacation) in 2025	
Total number of days spent in the US for each of 2023 & 2024 for each US filer (if not provided in prior years)	
<b>For New Clients:</b> Copy of the prior year's US federal and state income tax returns	

<b>Please add Additional Information</b>