



2023 U.S. INCOME TAX RETURN CHECKLIST
(Please complete and return with relevant information)

Please use this checklist to help organize all the items required to complete your tax return. Please check off the appropriate boxes. Please be sure to advise us of any changes in address or marital status.

Name: _____ Citizenship: _____

Name: _____ Citizenship: _____

Children: _____

Phone: _____ (during day) _____ (home) _____ (cell phone)

Email: _____

	'X'	Additional information
INCOME:		
Employment (W-2)	<input type="checkbox"/>	_____
Dividends and interest (need 1099)	<input type="checkbox"/>	_____
Social Security (need 1099)	<input type="checkbox"/>	_____
IRA, Pension income (need 1099)	<input type="checkbox"/>	_____
State and local refunds	<input type="checkbox"/>	_____
Gambling winnings and losses	<input type="checkbox"/>	_____
Brokerage statements showing investment transactions for stocks, bonds, etc.	<input type="checkbox"/>	_____
Schedule(s) K-1 showing income or loss from partnerships, S corporation or estates and trusts	<input type="checkbox"/>	_____
All other miscellaneous income slips from inside or outside the U.S.	<input type="checkbox"/>	_____
Business income and expenses (please complete schedule found at www.blrcpa.ca)	<input type="checkbox"/>	_____
Rental property income and expenses (please complete schedule found at www.blrcpa.ca)	<input type="checkbox"/>	_____
Copies of closing statements for purchase or sale of real property (include Form 8288)	<input type="checkbox"/>	_____
Alimony received	<input type="checkbox"/>	_____

DEDUCTIONS

- Total amount paid for real estate taxes _____
- Form 1098 or other for mortgage interest, student loan interest or investment interest _____
- Form 1098 for tuition expenses _____
- Medical expenses, if substantial _____
- Charitable donation receipts and the amount of non-cash contributions paid in the year _____
- Details of your child care expenses _____
- Alimony paid _____
- List of all estimated tax payments made and the dates paid _____
- Form 1095 for health insurance coverage _____
- Copy of your Canadian tax return for the year if prepared by another accountant including all tax information slips** _____

FOREIGN PROPERTY REPORTING

Do you hold or have signing authority over any foreign (to the U.S.) bank and/or investment accounts with a combined total value of \$10,000 or more at any time during the year? _____

Which ones?

- Canadian Bank accounts _____
- Canadian investment accounts _____
- Registered retirement savings plans or income funds (RRSP or RRIF) _____
- Registered education savings plans (RESP) _____
- Tax free savings accounts (TFSA) _____
- Other bank accounts, investments or property outside of the U.S. _____

If any of the above apply, please provide

- Account number
- Institution name
- Institution or branch address
- Type of account (ie RRSP/trading/checking/etc.)
- Is it held joint? If so, with who?
- Highest value reached in the year
- (Also applies to accounts you have signing authority over)

For RESPs:

Annual investment statements showing all contributions, grants, and income earned

For TFSAs:

Summary of income earned in the account each year broken down by income type (interest, dividends, capital gains, etc.)

Do you own a Canadian Controlled Private Corporation? If yes, please provide:

- Financial statements
- Corporate tax return
- Percentage of ownership

Please provide any other information you think may be relevant