

2022 US PERSONAL INCOME TAX RETURN CHECKLIST

Please complete and submit this checklist with your US income tax documents.

Name:	Phone #:
SSN:	Email:
Address:	Marital Status:
	# of Dependents (attach info):

GENERAL INFORMATION

Did we prepare your 2021 US Income Tax Return? If no , please enclose a copy of your prior year tax return.	Yes	No
Are we preparing your Canadian Income Tax Return? If no , please enclose a full copy of your 2022 Canadian tax return.	Yes	No
Did you make any US estimated tax payments in 2022? If yes , please provide details	Yes	No

FOREIGN (NON-US) ACCOUNTS

Did you have any non-US: bank accounts, non-registered investments, RPPs, RRSPs, RRIFs, RESPs, and/or TFSAs with a **combined aggregate** balance of **\$10,000 USD** or more at any time in 2022?

Yes No

If **yes**, please complete the table on page two of this document.

Did you own Canadian mutual fund trust units, shares of a Canadian mutual fund corporation or units of a Canadian ETF **in a non-registered (non-RRSP, non-RRIF)** account in 2022?

Yes No

Did you have a Tax-Free Savings Account (TFSA) in 2022? If yes , please note the actual income earned in the TFSA in 2022 _____	Yes	No
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Were you a subscriber/contributor to a Registered Education Savings Plan (RESP) in 2022? If yes , please note the actual income earned in the RESP in 2022 _____	Yes	No
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Do you own any shares in a Canadian (or other non-US) private corporation in 2022? If yes , please provide details on the share ownership and structure of the corporation.	Yes	No
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Are you the beneficiary or trustee/executor of a Canadian (or other non-US) trust or estate? If yes , please provide details of the trust interest.	Yes	No
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