

U.S. Non-Resident Personal Tax Return Checklist

madan

CHARTERED ACCOUNTANT

Professional Corporation

To help you assemble your financial information for the preparation of your U.S. Non-Resident Personal Tax Return, please keep this checklist handy. This checklist should be completed and returned to us, together with the financial information assembled.

Personal Information

Your Name: _____ SSN/ITIN: _____
Date of Birth: ____/____/____ (MM/DD/YY) Country of Citizenship: _____
Address: _____ Your Phone #: _____
Apt #: _____ City: _____ Email: _____
State: _____ Zip Code: _____ P.O. Box #: _____ Occupation: _____

Marital Status:

Single Married Common-Law Separated Divorced Widowed

Spouse Information (If Applicable)

Spouse Name: _____ SSN/ITIN: _____
Date of Birth: ____/____/____ (MM/DD/YY)

General Information

Have you ever applied for a U.S. visa?: Yes No N/A

If applicable, please provide the following details below.

If you had a visa on the last day of the tax year, enter your visa type. If you did not have a visa, enter your U.S. immigration status on the last day of the tax year: _____

Have you ever changed your visa type (non-immigrant status) or U.S. immigration status? Yes No
If "yes", indicate the date and nature of the change: _____

Have you ever applied for a Green Card?: Yes No N/A

Number of days spent in U.S. in 2019: _____ days

Number of days spent in U.S. in 2020: _____ days

Number of days spent in U.S. in 2021: _____ days

List all the dates you entered and left the United States during 2021 below:

Date entered United States (MM/DD/YY)	Date departed United States (MM/DD/YY)	Date entered United States (MM/DD/YY)	Date departed United States (MM/DD/YY)
____/____/____	____/____/____	____/____/____	____/____/____
____/____/____	____/____/____	____/____/____	____/____/____
____/____/____	____/____/____	____/____/____	____/____/____
____/____/____	____/____/____	____/____/____	____/____/____

Did you receive a compensation of more than \$250,000 in 2021?: Yes No N/A

Did you receive any other U.S. income in 2021?: Yes No N/A

Have you ever filed a U.S. Tax Return?: Yes No N/A

Did you file a U.S. income tax return for any prior year?: Yes No N/A

If "yes", give the latest year and form number you filed: _____

Please specify the type of income received in 2021: _____

Rental Property

Includes the Statement of Adjustments for purchase

Please indicate if you are the sole owner of the property or if you have a co-owner:

I'm the sole owner I have a co-owner

If you have a co-owner, please provide their details below:

Name: _____

SSN #: _____ owned: ____%

Date Rental Started (MM/DD/YY): ____/____/____

Date of Purchase (MM/DD/YY): ____/____/____

Address: _____

City: _____ Province/State: _____

Postal Code: _____ Country: _____

Total rental income \$ _____

Expenses (Total Annual Amount)

Advertising \$ _____

Insurance \$ _____

Mortgage Interest \$ _____

Office expenses \$ _____

Legal, accounting & other professional fees \$ _____

Management & administration fees \$ _____

Repairs and maintenance \$ _____

Salaries, wages & benefits \$ _____

Property taxes \$ _____

Travel \$ _____

Utilities \$ _____

Other: _____ \$ _____

Major renovations & purchases (i.e. appliances):

_____ \$ _____

_____ \$ _____

Other Important Matters

Do you want your tax refund (if any) deposited directly to your bank account?: Yes No

If "**yes**", please provide the following details of a U.S. bank account.

1. Routing #: _____

2. Account #: _____

3. Account Type: Saving Chequing

Notes