

Instructions to Follow After Filing Your Canadian Return

The CRA regularly conducts review programs as an important part of the self-assessment tax system. To determine if they have assessed your return correctly, they generally request additional information. This is more common when you e-file your return.

The following are some of the additional information requested by the CRA:

1. Completed form T2209: Federal Foreign Tax Credits, for each country to which you paid foreign taxes
2. Copy of your notice of assessment or statement from the foreign tax authority
3. Transcripts from the Internal Revenue Service (you can request a transcript at <https://www.irs.gov/individuals/get-transcript>)
4. Your account statement or similar document from the state and municipal tax authority.
5. Foreign income tax return and attachments
6. All information slips e.g. W2, 1099,s etc.
7. Types of foreign source income.
8. Proof of taxes paid and or refunds received
9. Computation of Foreign income & Taxes Paid.

As a part of our engagement we will prepare and provide you a copy of the form T2209 and the worksheet of the computation of foreign income and taxes paid. You can request a transcript from the IRS by visiting the above link. In case you receive a notice from the CRA would can provide them the necessary documents.