

# T2062 Checklist

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CHARTERED ACCOUNTANT

Professional Corporation

If you are preparing for an "Application for a Certificate of Compliance", please fill out this checklist.

## Seller's Information

First Name : \_\_\_\_\_

Last Name : \_\_\_\_\_

Social Insurance Number : \_\_\_\_\_

Date of Birth : \_\_\_\_\_  
*dd/mm/yyyy*

Date of Departure from Canada : \_\_\_\_\_  
*dd/mm/yyyy*

Present Address : \_\_\_\_\_

Telephone Number : \_\_\_\_\_

Latest year of Canadian Tax Return filed : \_\_\_\_\_

Representative's Name (Lawyer) : \_\_\_\_\_

Representative's Address (Lawyer) : \_\_\_\_\_

Representative's Telephone Number (Lawyer) : \_\_\_\_\_

## Purchaser's Information

First Name : \_\_\_\_\_

Last Name : \_\_\_\_\_

Telephone Number : \_\_\_\_\_

Present Address : \_\_\_\_\_

Representative's Name (Lawyer) : \_\_\_\_\_

Representative's Address (Lawyer) : \_\_\_\_\_

Representative's Telephone Number (Lawyer) : \_\_\_\_\_

## Details of Property

Closing Date : \_\_\_\_\_  
*dd/mm/yyyy*

Purchase Price: \$ \_\_\_\_\_

Sale Price : \$ \_\_\_\_\_

Any major improvements and repairs performed on property?

Yes      No



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## Details of Property (continued)

**Is this property co-owned?** If yes, please enter the following information:

**Co-owner's Full Name :** \_\_\_\_\_

**Social Insurance Number:** \_\_\_\_\_

**Date of Birth :** \_\_\_\_\_  
dd/mm/yyyy

**Departure Date from Canada (if applicable) :** \_\_\_\_\_  
dd/mm/yyyy

**Present Address :** \_\_\_\_\_

**Telephone Number :** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Is it a rental property?** If yes, what period was the income received?

\_\_\_\_\_ to \_\_\_\_\_  
dd/mm/yyyy dd/mm/yyyy

**Was non-resident tax withheld?** If yes, list the name and address of the person who withheld the tax (agent).

**Full Name :** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Market Value of property on the start of rental use: \$** \_\_\_\_\_

## Supporting Documents

**Please mark the checkboxes when you have provided the:**

- Copy of original purchase agreement
- Sales Agreement
- Registered deeds on purchase and sale
- Trust Ledger Statement/Statement of Adjustments (at the time of purchase and time of sale)

**If you have a rental property, please mark the checkboxes when you have provided the :**

- Copy of original purchase agreement
- Sales Agreement
- Registered deeds on purchase and sale
- List of capital improvements made to the property
- Copies of Tax Returns for years of rental
- Trust Ledger Statement/Statement of Adjustments (at the time of purchase and time of sale)