

# U.S. Non-Resident Personal Tax Return Checklist

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 2022: \_\_\_\_\_ days

Number of days spent in U.S. in 2023: \_\_\_\_\_ days

Number of days spent in U.S. in 2024: \_\_\_\_\_ days

List all the dates you entered and left the United States during 2024 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 2024?: Yes No N/A

Did you receive any other U.S. income in 2024?: 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 2024: \_\_\_\_\_

## 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