

CANADIAN SUPPLEMENT

Please fill this out and send it along with your US Workbook if TravelTax is preparing your T1's. If we are not preparing your T1, please give us the contact information for your Canadian counterpart.

NAME		SIN #	
SPOUSE NAME		SIN #	
MARITAL STATUS	_____ (married, common law, widowed, divorced, separated, single) If your marital status changed during the year, provide date _____		
Do you authorize the CRA to provide your contact information to Elections Canada ___ Y ___ N			
Do you have more than 100K in assets outside of Canada? ___ Y ___ N			
Do you own part, or all, of a Canadian company? ___ Y ___ N			

ADDITIONAL INFORMATION ABOUT DEPENDENTS

Name	SIN#	Net Income if we are not preparing their return	Child Care, Fitness, or Arts Expenses

Identify any dependent that is infirm and describe the disability:

DOCUMENTS AND DATA TO SEND – Please send copies, not originals

Copy of VISA / immigration card

Copies of T4, Interest, Dividend Statements, T3, T5, and other Tslips

Any notices from CRA

Old Age Security/ CPP or RRSP/RRIF income and/or statements

Copy of voided check (not deposit slip) for direct deposit.

If applicable:

RRSP and RESP withdraws (*usually on slips*)

RRSP and RESP contributions not reported on T4's

Interest and Investment Income (*not on slips*)

Rental Income (complete form supplied with US workbook – indicate currency used)

Receipts for medical payments and insurance policies

Tuition totals

Student loan interest statements

Any other required tax documents

If a new client: Copies of the previous year's Canadian tax returns (incl. Quebec), or notice of assessment.