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 Expenses (Quebec only: Fitness, or Arts Expenses)

Identify any dependent that is infirm and describe the disability:

ADDITIONAL QUESTIONS - *Check the "ask me" box in addition to your 'yes/no' if you need to discuss this with us.*

Yes	No	Ask Me	
			1) Did you pay for digital newspaper subscriptions? Amount $ ___________________ (not to exceed $500)
			2) Did you pay for childcare expenses? (use main workbook)
			3) Did you have moving expenses within Canada? (will discuss in interview)
			4) Did you pay union or professional dues not on main workbook?
			5) Were you a northern resident in the tax year?
			6) Are we transferring educational credits to another person?
			7) Did you recently purchase a home in Canada?
			8) Were you a volunteer firefighter or rescue volunteer?
			9) Please add us as a **My Account representative level 2** (**Joseph's Rep ID # H843ML7**)

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

- ☐ Copy of VISA / immigration card (if working in the US)
- ☐ Copies of T4, Interest, Dividend Statements, T3, T5, T5008, and other Tslips
- ☐ Old Age Security / CPP or RRSP/RRIF income and/or statements
- ☐ Copy of voided check (not deposit slip) for direct deposit (if changing from previous year)
- ☐ Any notices from CRA

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 main workbook – indicate currency used)
- ☐ Amounts for medical payments and health insurance policies
- ☐ Tuition slips
- ☐ Student loan interest statements
- ☐ Any other tax documents you have
- ☐ UCCB statements
- ☐ If a new client: Copies of the previous year's Canadian tax returns (including Quebec), or Notice of Assessment.

TravelTax LLC/TravelTax Canada ULC – 46 St. Mark Rd., Taylors, SC 29651 - Fax 877.872.8829 - Office 866.272.7871