








TravelTax Canadian Supplement

This workbook is to be used by Canadians and completed in addition to the workbook for US activity if TravelTax is preparing your T1's. If we are not preparing your T1, please give us the contact information for your Canadian counterpart.









. There may be some duplication of information from the main organizer.

Documents and Data to Send Copies, not originals

All Clients

-  Copy of VISA / immigration card
-  Copies of T4's
-  Interest and/ or Dividend Statements / T5's/ T3's
-  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. "X" here ___ if you decline this
-  Copies of the previous year's US and/or Canadian Tax Returns including state returns (NA for previous TravelTax clients)

If Applicable

-  RRSP and RESP withdraws.
-  RRSP and RESP contributions not reported on T4's
-  Unreported Interest and Investment Income
-  Rental Income (complete form supplied with US workbook)
-  Receipts for medical payments
-  Adoption Expenses
-  If you are a Resident Alien and have >10,000\$ USD located outside of the US, list all foreign accounts and their balances.
-  Totals from Canadian transit passes for each member of the family

This is not a complete list of all items that may be required. We will contact you for any additional items that we need

Demographics

Tax Year _____

Name _____ SIN# _____

Spouse: _____ SIN# _____

For joint filers, name order should be the same as previous tax years. If newly married, the order should be continued in subsequent years

Canada: Spouses Net Income if we are not preparing the return (line 236 on T1) _____

Marital Status _____ If your marital status changed during the year, provide date _____

Canadian Filing Status:

Married? Common Law? Widowed? Divorced? Separated? Single?

Did you move your permanent residence during the year? ____

If so, please provide old address _____

Did you cease to be a Canadian resident or become a Canadian resident during the year? __ Date _____

ASSUMPTIONS that we make unless **MARKED** otherwise (leave blank if acceptable):

1) You authorize the CRA to provide your contact information to Elections Canada _____

Additional Information about Dependents

Name	SIN#	Net Income if we are not preparing return	Child Care Expenses

Identify any dependent that is infirm and describe the disability

Please Initial _____