

BHONDI ACCOUNTING & TAX LTD.

CHARTERED PROFESSIONAL ACCOUNTANT

Non-Resident - 1040NR Personal Income Tax Return Checklist 2023

Name: _____

Spouse Name (if applicable): _____

Email: _____

Email: _____

Phone: Cell _____

Phone: Cell _____

Phone: Other _____

Phone: Other _____

Address: _____

REQUIRED INFORMATION: Please check all applicable and attach related information. (If we prepare your Canadian tax return, please also complete the "Canadian Personal Tax Organizer 2022")	Y / N
US tax information slips (i.e., W-2, US Social Security, 1099, K-1, 1042-S) Canadian tax information slips (i.e., T3, T4, T5)	
Rental property also used personally: # of days rented _____ AND # of days used personally _____	
Paid any US Federal or State income tax payments: date and amount	
Do you have a ROTH IRA? YES / NO If yes, did you contribute during the year? YES / NO	
US source income and expense information or schedule (i.e., rental income and expenses)	
Purchase or disposal of any assets located in the US	
Specific dates for each US filer who went anywhere in the US, for any purpose (including vacation) in 2023	
Total number of days spent in the US for each of 2022 & 2021 for each US filer (if not provided in prior years)	
For New Clients: Copy of the prior year's US Federal and State income tax returns	

<i>Please add Additional Information</i>