

Name of requestor

Name of partner

Instructions

Please sort your documents in the order of the documents in this list.

The new platform is simpler and faster

A fee of \$250 per return applies to manual drop method, as we perform manual validation of documents and a manual estimate of fees. Try the Smart Drop if you can.

Documents to bring**Mandatory**

- Last income tax return (**only for new costumers**)
- Check specimen for direct deposit If not provided previously (U.S.A. Bank only / Canadian banks are not accepted)

Income (U.S persons such as citizen, green card holder and residents)

- Copy of Canadian income tax returns (applies to U.S citizens or Green card holders living in Canada **only**)
- Income earned in Tax Free Savings Account (applies to U.S persons)
- Income earned (including grants) in Registered Education Savings Plan (applies to U.S persons)
- Income earned in First Home Savings Account (applies to U.S persons)
- Detail about disposition of principal residence (applies to U.S persons)

[Fill the form](#)

Income (All clients)

- Employment income; W2
- Investment income: 1099-DIV, 1099-Int
- Capital gains, 1099-B or a list of all transactions (including purchase and sold date)
- Retirement and social security income 1099-R, SSA-1099
- State / local tax refund 1099-G
- Scholarship
- Employment Insurance (unemployment)
- Welfare; Statement of benefits;
- Self-employed (income & expenses) [Fill the form](#)
- Rental income (income & expenses) [Fill the form](#)
- Income subject to withholding; 1042-S
- Economic Impact Payment - Notice 1444-C - (Your Economic Tax Payment Letter) or Letter 6475
- Schedule K-1
- Advanced Child Tax Credit - Letter 6419

Others**Deductions**

- IRA or ROTH IRA, Official receipts
- Tuition fees
- Student: Interest paid on student loans – Bank account statement
- Charity donation
- Child care expenses

U.S. citizens, U.S. residents, or green card holders

- US Financial Reporting questionnaire [Fill the form](#)
- TFSA annual statement for each account
- FHSA statement
- 709 Gift tax - if you gave gifts of more than \$17,000 to anyone.

If you sold a property (building) in the USA (as a non-resident)

- Settlement statement when you bought the property (from the notary)
- Settlement statement when you sold the property (from the notary)
- Building history questionnaire [Fill the form](#)
- Form 8288 - Withholding taxes
- Form 8288-A Statement of withholding taxes