



LIST: DOCUMENTS TO PROVIDE (US)

Name of requestor

Name of partner

Instructions
Prepare your documents in advance, or simply [go directly to the platform](#) and let the questions guide you.

Save by Filing Outside the Peak Filing Period
Certain tax situations can be handled outside the peak filing period, allowing you to benefit from reduced fees and shorter processing times. [Learn more](#)

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

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 \$19,000 (in 2025) 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

Others

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