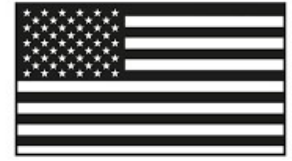




# US RETURN INCOME TAX CHECKLIST



To assist you in preparation of your federal & state US return please provide us with the following information to report your US income.

*We highly recommend filing both Canadian & US returns at the same time.*

## PERSONAL INFORMATION

- Social security or tax ID number
- Spouse's full name, date of birth, and social security or tax ID number

## INCOME

- Employment income (W-2)
- Unemployment income (1099-G)
- Retirement Income
  - › Pension/IRA/Annuity income (1099-R)
  - › Social security/RRB income (SSA-1099, RRB-1099)
- Savings & Investments
  - › Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
  - › Income from sales of stock or other property (1099-B, 1099-S)
  - › Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Other income
  - › Gambling income (W-2G)
  - › Jury duty records
  - › Hobby income and expenses
  - › Prizes and awards
  - › Trust income
  - › Royalty Income 1099-MISC
  - › Any other 1099s received
  - › Record of alimony paid/received with ex-spouse's name and SSN
  - › State tax refund

## DEPENDANT(S) INFORMATION

- Date of birth
- Social security or tax ID number
- Income of dependents (if applicable)

## OTHER INFORMATION

- VOID cheque or Direct Deposit information (for refund deposit)