Count myAccount

2026 Tax Year

NON-RESIDENT TAX CHECKLIST

Canadian-Source Income for Non-Residents

Check off everything that applies, gather those documents, and send them to us.
Not sure of your residency status? We can review it (form NR73) before filing – just ask.

A ABOUT YOU

- [ ] SIN or Individual Tax Number (ITN)
- [ ] Full legal name, date of birth, foreign address
- [ ] Country of tax residence (+ proof / residency certificate)
- [ ] Marital status; spouse name & net income
- [ ] Direct deposit details (if refund expected)
- [ ] Last year's Notice of Assessment (if filed before)

B CANADIAN-SOURCE INCOME

- [ ] T4 – Canadian employment income
- [ ] T4A-NR – fees / services performed in Canada
- [ ] NR4 – rental, pension, dividends paid to non-residents
- [ ] T5 / T3 – Canadian investment or trust income
- [ ] T5008 – securities transactions
- [ ] Statement of Canadian rental income

C FORMS, ELECTIONS & EXPENSES

- [ ] Tax treaty benefits documentation (your country)
- [ ] Section 216 election – net rental income
- [ ] Section 217 election – Canadian pension / EI
- [ ] Rental expense records (mortgage interest, property tax, repairs)
- [ ] Sale of Canadian property – T2062 Certificate of Compliance
- [ ] RRSP / RRIF withholding statements

D SIGN & RETURN – we send these to you

- [ ] CMA-IND-101 Intake Form – completed & signed
- [ ] Privacy Policy – signed
- [ ] Authorization Form (AUT-01) – signed, lets us file for you