

# Departing Residents Checklist

Personal Information																																									
First Name		Last Name																																							
Date of Birth		S.I.N.																																							
Home Phone		Cell Phone																																							
Province of Residence upon Departure		Date of Departure																																							
New Address (in country you reside)																																									
Marital Status	<input type="checkbox"/> Single	<input type="checkbox"/> Separated	<input type="checkbox"/> Divorced																																						
	<input type="checkbox"/> Married	<input type="checkbox"/> Common-law	<input type="checkbox"/> Widowed																																						
Email Address																																									
Direct Deposit Information for Canadian Bank	<table border="1"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td colspan="2">Branch #</td> <td colspan="2">Bank #</td> <td colspan="14">Account #</td> </tr> </table>																							Branch #		Bank #		Account #													
Branch #		Bank #		Account #																																					
CRA can only deposit the refund directly to your Canadian bank account, otherwise a cheque will be mailed to your foreign address.																																									

Spouse Information			
First Name		Last Name	
Date of Birth		S.I.N.	
Net Income		Self-Employed	<input type="checkbox"/> YES <input type="checkbox"/> NO

## Dependent Information

	Dependent 1	Dependent 2	Dependent 3
First Name			
Last Name			
Date of Birth			
S.I.N.			
Net Income			

## Principal Residence Held Upon Departure from Canada

√	Principal Residence	
<input type="checkbox"/>	Principal Residence Status	<input type="checkbox"/> Sold Before Departure <input type="checkbox"/> Still Owned at Departure
<input type="checkbox"/>	Year of Purchase	
<input type="checkbox"/>	Purchase Price	\$
<input type="checkbox"/>	Sale Price/ Fair Market Value of Property on Departure	\$
<input type="checkbox"/>	Jointly Held with Spouse	<input type="checkbox"/> YES <input type="checkbox"/> NO
<input type="checkbox"/>	If you still own the property, do you plan to rent it out?	<input type="checkbox"/> YES <input type="checkbox"/> NO

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39 Centre Street, Thornhill, ON L4J 1G1  
 Tel: (905) 771-1131 | Fax: (905) 763-7689  
 Email: [info@accplus.ca](mailto:info@accplus.ca) | Web: [www.accplus.ca](http://www.accplus.ca)

## Investments Held Upon Departure from Canada

√	Investments	
Registered Investments		
<input type="checkbox"/>	Type of Investment	<input type="checkbox"/> RRSP  <input type="checkbox"/> TFSA <i>Do not contribute to your TFSA after departure.</i>  <input type="checkbox"/> CPP <i>Notify Service Canada about your departure.</i>  <input type="checkbox"/> OAS <i>Notify Service Canada about your departure.</i>  <input type="checkbox"/> Privately Held Pension <i>Notify pension company about your departure</i>
Non-Registered Investments		
<input type="checkbox"/>	Type of Investment	<input type="checkbox"/> Stock <input type="checkbox"/> Mutual Funds <input type="checkbox"/> GICs <input type="checkbox"/> Bonds <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<b>Original Purchase Costs of Investments</b> <i>Please provide investment statements</i>	\$
<input type="checkbox"/>	<b>Fair Market Value of Property on Departure</b>	\$
<input type="checkbox"/>	<b>Jointly Held with Spouse</b>	<input type="checkbox"/> YES <input type="checkbox"/> NO

## Rental Properties Held Upon Departure from Canada

√	Rental Properties	
Rental Property 1		
<input type="checkbox"/>	Address:	
<input type="checkbox"/>	Date of Purchase	
<input type="checkbox"/>	Original Purchase Cost	\$
<input type="checkbox"/>	Costs (Land Transfer Tax, Lawyer Fees)	\$
<input type="checkbox"/>	Renovations/Property Improvements	\$
<input type="checkbox"/>	Fair Market Value of Property on Departure	\$
<input type="checkbox"/>	Jointly Held with Spouse	<input type="checkbox"/> YES <input type="checkbox"/> NO
<input type="checkbox"/>	Will you rent these properties after departing Canada?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Rental Property 2		
<input type="checkbox"/>	Address:	
<input type="checkbox"/>	Date of Purchase	
<input type="checkbox"/>	Original Purchase Cost	\$
<input type="checkbox"/>	Costs (Land Transfer Tax, Lawyer Fees)	\$
<input type="checkbox"/>	Renovations/Property Improvements	\$
<input type="checkbox"/>	Fair Market Value of Property on Departure	\$
<input type="checkbox"/>	Jointly Held with Spouse	<input type="checkbox"/> YES <input type="checkbox"/> NO
<input type="checkbox"/>	Will you rent these properties after departing Canada?	<input type="checkbox"/> YES <input type="checkbox"/> NO

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Please note that upon departure from Canada, there is a deemed disposition of property/investments. Tax can be deferred by filing an election with the CRA. Accounting Plus Financial Services can assist you with the election.

[Contact us](#) for further details regarding tax withholding and filing requirements for non-residents earning rental income.

We have also included a link to our [Personal Income Tax Checklist](#) for a more detailed list of documents that we may require.

Please fill out the checklist to ensure you have all documents and information ready to file your personal tax return. If you are a new client, please fill out the personal information section.

Once you complete the personal tax checklist and gathered all documents, please send us the checklists with all tax-related documents by email at [info@accplus.ca](mailto:info@accplus.ca).

Since you are not a Canadian resident anymore, we are required to paper file your tax return. Paper returns usually take between 3 to 4 months for the CRA to process.

Please do not hesitate to contact us if you have any questions.

We look forward to hearing back from you!

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