

Non-Resident Tax Addendum (Canada)

This addendum is to be completed ONLY if you were a non-resident or deemed non-resident of Canada for income tax purposes at any time during the tax year.

This form supplements the main client intake questionnaire for Numbers & Letters Business Solutions Ltd.

1. Residency Status

- Non-resident for the entire tax year
- Part-year resident (arrival to or departure from Canada during the year)
- Deemed non-resident (treaty resident of another country)

Date of entry into Canada (if applicable): _____

Date of exit from Canada (if applicable): _____

Country of tax residence during the year: _____

Was a tax return filed in that country for the same tax year? Yes No

2. Residential Ties to Canada (Check all that apply)

- Dwelling available for your use in Canada
 - Spouse or common-law partner residing in Canada
 - Dependents residing in Canada
 - Canadian bank account(s)
 - Canadian credit card(s)
 - Canadian driver's licence
 - Provincial or territorial health coverage
 - Vehicle registered in Canada
 - Social, professional, or recreational memberships in Canada
 - Other ties (please specify): _____
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3. Canadian-Source Income Received

Please check all types of income you received from Canadian sources during the tax year:

- Employment income (T4)
- Self-employment or business income
- Rental income from Canadian property
- Pension income (CPP, OAS, private pension)
- Investment income (interest, dividends)
- Capital gains from Canadian property or shares
- Other income (please specify): _____

Was non-resident tax (e.g., 25%) withheld at source? Yes No Unsure

4. Foreign (World) Income

Did you earn income outside Canada during the tax year? Yes No

If yes:

- Total foreign income (in Canadian dollars): _____ Income Tax paid: _____
- Country or countries earned in: _____
- Total foreign income (in Canadian dollars): _____ Income Tax paid: _____
- Country or countries earned in: _____
- Total foreign income (in Canadian dollars): _____ Income Tax paid: _____
- Country or countries earned in: _____

Approximately what percentage of your total world income was earned in Canada?

- Less than 90%
- 90% or more
- Unsure

Note: If less than 90% of your world income was earned in Canada, eligibility for certain non-refundable tax credits may be limited under CRA rules.

5. Spouse and Dependents (If Applicable)

Is your spouse or common-law partner in Canada? Yes No

If no:

- **Spouse's foreign income (CAD):** _____

Are any of your dependents residing in Canada? Yes No

6. Departure or Arrival Considerations (If Applicable)

- I ceased Canadian residency during the year (departure date required)
- I became a resident of Canada during the year (arrival date required)
- I may be subject to departure tax (deemed disposition)
- Not applicable / Unsure
- Form NR73 (Determination of Residency Status) previously filed with CRA
- Not filed / Unsure
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Acknowledgment: By signing below, I confirm that all information provided is true and accurate. I understand that Numbers & Letters Business Solutions Ltd prepares my return, but the CRA makes the final determination on assessments.

Client Signature:

Date (YYYY/MM/DD)