

1. Arrival and income periods

Foreign income - year of arrival

Client legal name

Complete this form for foreign income after Canadian tax residency began in 2025. Also complete form 06. Keep pre-arrival figures separate. Use this instead of form 09 for the same arrival-year income.

Attach bookkeeping reports and T slips. Do not re-enter any figures already shown on them. Enter only missing figures and other details. Select Yes / No / Unsure; use N/A as needed.

Physical arrival date

Proposed Canadian tax-residency start date

Former country / foreign tax year-end

Spouse arrival / residency date

Form 06 completed with residency ties and asset values?

☐ Yes ☐ No ☐ Unsure

World income BEFORE Canadian residency - keep separate

Person / period	Canadian-source net income CAD	Foreign-source net income CAD

Foreign income AFTER Canadian residency

Income type / country	Gross amount / original currency	Tax / period / statement

Income spanning arrival date: earning period, payment date and allocation basis

Supply records even for income left abroad, paid later, or thought treaty-exempt. Also include Canadian income through the main intake.

2. Post-arrival income and foreign taxes

Foreign income - year of arrival

Copy this section for each income source that needs detail. If an attached report supplies the information, give its filename and source reference instead.

Attach T slips and reports; do not re-enter figures already shown. For missing income, provide payer/account, gross income before tax, currency, dates, expenses and foreign taxes. Identify income already included in another slip, report or worksheet so it is not counted twice.

Source to explain in detail / owner and ownership %	Country where work/property/income arose
<div></div> <div>Gross income / currency / payment dates</div>	<div></div> <div>Foreign tax withheld / currency</div>
<div></div> <div>Foreign tax actually paid / refunded / dates</div>	<div></div> <div>Related expenses / currency / dates</div>
<div></div> <div>CAD conversion / rate / source (or attach original-currency records)</div>	<div></div>
<div></div> <div>Income already on a Canadian slip, report or another worksheet; give exact reference</div>	
<div></div> <div>Any income believed exempt under a treaty or subject to a special election?<div>☐ Yes ☐ No ☐ Unsure</div></div>	
<div></div> <div>Treaty/election explanation and prior advice; do not omit the income</div>	

3. Investments, assets and pensions after arrival

Foreign income - year of arrival

Assets sold after arrival

Asset / country	Original cost / arrival FMV	Sale date / proceeds / costs

Valuation at residency date, exchange rates, accrued income and source documents

Foreign pension, social-security, annuity or retirement-account payments? ☐ Yes ☐ No ☐ Unsure

Plan name/type/country, contributions, payment frequency, gross withdrawals and taxes

Foreign rental, business, partnership, trust or company interests? ☐ Yes ☐ No ☐ Unsure

Related form 03/07 records; ownership/control; distributions/contributions; retained accounts

Foreign tax year differs from calendar year or tax refund/reassessment expected? ☐ Yes ☐ No ☐ Unsure

Tax-year allocation, assessments, payment/refund dates and taxes attributable to post-arrival income

4. Arrival-year supporting records

Foreign income - year of arrival

Attach

☐ Form 06 and residency-date evidence

☐ Foreign slips, payroll/pension statements and bank records

☐ Foreign return/assessment and proof of tax paid/refunded

☐ Arrival-date asset valuations and sale records

☐ Rental/business schedules where applicable

☐ Pre-arrival world-income figures for you and spouse

Final review

Have you attached the requested records or listed what is missing?

☐ Yes☐ No☐ Unsure

Missing documents, estimates, unclear answers or additional facts

Completed by

Date (YYYY-MM-DD)

This worksheet gathers facts for Canadian tax preparation. Arsen Accounting will review eligibility, calculations and any required elections. Filing authorization is obtained separately.