

1. Dates, countries and household

Arrival, departure and residency

Client legal name

Complete this form if you moved into or out of Canada, or tax residency is uncertain. Use one copy per person. Supply dates and ties for review; physical arrival and tax-residency dates may differ.

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.

Situation

☐ Arrival

☐ Departure

☐ Both

☐ Residency unsure

Physical arrival / departure date

Proposed tax-residency change date

Country moved from / to

Citizenships / other tax-residence countries

Immigration status / permits / foreign tax ID (if needed)

Date first EVER Canadian tax resident

Earlier Canadian residence periods / prior departures and returns

Spouse/dependants: names, arrival/departure dates and where they lived

Travel and residence timeline

Country / address	From / to dates	Days / reason / documents
<div></div>	<div></div>	<div></div>
<div></div>	<div></div>	<div></div>
<div></div>	<div></div>	<div></div>

Canadian province before departure / at year-end

Foreign tax year-end / filed returns

Residency determination, NR73/NR74, treaty advice or CRA ruling already obtained?

☐ Yes

☐ No

☐ Unsure

2. Homes, ties and reason for the move

Arrival, departure and residency

Previous residency determination, NR73/NR74, treaty advice or ruling: explain and attach records

Homes available in each country

Address / country	Owned/rented / dates available	Family use / rented out / disposed

Spouse/dependants location; date family moved; reasons for separate moves

Employment/business location and dates; contract duration; intention to return

Continuing ties

Tie	Canada details / dates	Other country details / dates
Banking / investments / credit cards		
Health coverage / driver licence / vehicle		
Personal possessions / memberships		
Business interests / professional licences		
Social ties / dependants / schooling		

Foreign tax residence evidence; permanent home; centre of personal/economic interests

3. Income before and after residency change

Arrival, departure and residency

Keep resident and non-resident periods separate. Supply gross income, related expenses and taxes in original currency. Arsen Accounting will determine Canadian reporting and credit treatment.

Income by period and source

Person / income type / country	Dates / resident or non-resident period	Gross / expenses / tax / currency

Your net world income for non-resident period (CAD)

Spouse net world income for relevant periods (CAD)

Canadian rental, employment, pension, investment or business income after departure? ☐ Yes ☐ No ☐ Unsure

Canadian payers, NR4/T4 slips, withholding and any section 216/217 election or NR6

For arrivals: pre-arrival world income for each of the two preceding calendar years, for self and spouse

Benefits received/applied for; CRA change-of-residency notifications; repayments

4. Assets at arrival or departure

Arrival, departure and residency

Provide all relevant Canadian and foreign assets so Arsen Accounting can determine exclusions and deemed dispositions. This inventory does not mean every asset is subject to departure tax. Repeat this page for additional assets.

Asset inventory

Asset / country / owner share	Acquisition date / original tax cost	FMV at change date / currency

Valuation source and date; appraisals; stock/account statements; exchange rates

Include or identify separately

- ☐ Canadian and foreign real estate
- ☐ Shares, funds, options, crypto and private-company interests
- ☐ Pensions and registered accounts
- ☐ Trust/partnership interests and business assets
- ☐ Insurance policies, valuable personal property and other rights

Property owned before earlier immigration; inherited property; prior residency length; liens/loans

Assets sold/transferred before or after move; dates, proceeds, recipients and relationships

5. Departure follow-up facts and documents

Arrival, departure and residency

- Canadian payers and financial institutions notified of non-resident status?

☐ Yes ☐ No ☐ Unsure
- Canadian home retained, rented, sold or offered for sale?

☐ Yes ☐ No ☐ Unsure
- Previous departure-tax deferral, security or returning-resident election?

☐ Yes ☐ No ☐ Unsure
- Disposed of Canadian property as a non-resident or obtained a compliance certificate?

☐ Yes ☐ No ☐ Unsure
- T1161/T1243/T1244 or T2062-related records, prior elections and tax deferred

Pension/RRSP/FHSA/TFSA activity after departure, contributions and notices

Attach

- ☐ Residency/travel and household timeline
- ☐ Housing/employment agreements and foreign residence evidence
- ☐ Canadian and foreign tax returns/slips/assessments
- ☐ Asset valuations, historical costs and prior elections
- ☐ Non-resident withholding and CRA correspondence

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 byDate (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.