

Name: \_\_\_\_\_

## FOREIGN PROPERTY & INVESTMENTS CHECKLIST

**If applicable, please complete the below IN ADDITION to the Personal Tax Checklist**

Canadian resident individuals who held certain property outside Canada with a total cost of more than \$100,000 CAD at any time during the tax year are subject to certain disclosure requirements to the Canada Revenue Agency (CRA).

**Non-compliance with this reporting requirement results in severe penalties. To help us determine whether you are subject to the reporting rule, please read and consider each of the following questions carefully when answering them.**

If you owned any of the following property at any time during 2019, answer yes to the relevant questions. You may be subject to the foreign property reporting rule, and we may prepare additional forms to submit to the CRA.

1. Funds held outside Canada .....  Yes    No
2. Shares of non-resident corporations (other than foreign affiliates) .....  Yes    No
3. Indebtedness owed by non-resident.....  Yes    No
4. Interests in non-resident trusts .....  Yes    No
5. Real Property outside Canada  
(other than personal use and real estate used in an active business).....  Yes    No
6. Other Property outside Canada.....  Yes    No
7. Property (Foreign Shares) held in an account with a Canadian registered securities  
dealer or a Canadian trust company .....  Yes    No

Please note:

- There could be a combination of foreign properties that totals to over \$100,000 CAD, please contact Stanley Accounting for additional details to be provided.
- Contact your Financial Advisor to confirm if a T1135 has been prepared on your behalf, or prepared and submitted to the CRA. Provide a copy to Stanley Accounting.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_