

# T2062 Checklist

If you are preparing for an "Application for a Certificate of Compliance", please fill out this checklist.

## Seller's Information

**First Name :** \_\_\_\_\_

**Last Name :** \_\_\_\_\_

**Social Insurance Number :** \_\_\_\_\_

**Date of Birth :** \_\_\_\_\_  
*dd/mm/yyyy*

**Date of Departure from Canada :** \_\_\_\_\_  
*dd/mm/yyyy*

**Present Address :** \_\_\_\_\_

**Telephone Number :** \_\_\_\_\_

**Latest year of Canadian Tax Return filed :** \_\_\_\_\_

**Representative's Name (Lawyer) :** \_\_\_\_\_

**Representative's Address (Lawyer) :** \_\_\_\_\_

**Representative's Telephone Number (Lawyer) :** \_\_\_\_\_

## Purchaser's Information

**First Name :** \_\_\_\_\_

**Last Name :** \_\_\_\_\_

**Telephone Number :** \_\_\_\_\_

**Present Address :** \_\_\_\_\_

**Representative's Name (Lawyer) :** \_\_\_\_\_

**Representative's Address (Lawyer) :** \_\_\_\_\_

**Representative's Telephone Number (Lawyer) :** \_\_\_\_\_

## Details of Property

**Closing Date :** \_\_\_\_\_  
*dd/mm/yyyy*

**Purchase Price: \$** \_\_\_\_\_

**Sale Price : \$** \_\_\_\_\_

**Any major improvements and repairs performed on property?**

Yes      No

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## Details of Property (*continued*)

**Is this property co-owned?** If yes, please enter the following information:

**Co-owner's Full Name :** \_\_\_\_\_

**Social Insurance Number:** \_\_\_\_\_

**Date of Birth :** \_\_\_\_\_  
*dd/mm/yyyy*

**Departure Date from Canada (if applicable) :** \_\_\_\_\_  
*dd/mm/yyyy*

**Present Address :** \_\_\_\_\_

**Telephone Number :** \_\_\_\_\_

**Relationship:** \_\_\_\_\_

**Is it a rental property?** If yes, what period was the income received?

\_\_\_\_\_ to \_\_\_\_\_  
*dd/mm/yyyy* *dd/mm/yyyy*

**Was *non-resident tax* withheld?** If yes, list the name and address of the person who withheld the tax (agent).

**Full Name :** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Market Value of property on the start of rental use: \$** \_\_\_\_\_

## Supporting Documents

**Please mark the checkboxes when you have provided the:**

Copy of original purchase agreement

Sales Agreement

Registered deeds on purchase and sale

Trust Ledger Statement/Statement of Adjustments (at the time of purchase and time of sale)

**If you have a rental property, please mark the checkboxes when you have provided the :**

Copy of original purchase agreement

Sales Agreement

Registered deeds on purchase and sale

List of capital improvements made to the property

Copies of Tax Returns for years of rental

Trust Ledger Statement/Statement of Adjustments (at the time of purchase and time of sale)