

Arrive with facts.

Your Canadian departure, ready for a useful conversation.

Complete what you know. Mark estimates clearly. Keep unanswered questions visible so your adviser can identify the decisions that need attention.

Prepared by / household

Meeting date / adviser

1

Your move, in dates

Proposed destination / current location

Date you left or expect to leave Canada

When your partner / dependants move, if relevant

Expected Canadian visits or continuing work

Keep planned events separate from actual events. A flight date alone does not settle Canadian tax residency.

2

The facts behind the move

Homes & household

Which homes remain available? Where will each household member live?

Work & business

Where will you perform duties or make business decisions? What continues in Canada?

Assets & accounts

List property, investments, registered accounts and business interests by owner.

Income & obligations

Record income sources, existing tax questions and any notices or deadlines.

Leave with decisions.

Use the meeting to agree who does what next.

3 Bring an index of supporting records

Travel history; housing and household dates; work arrangements; account and asset records; prior advice; relevant notices. Identify missing records and who can obtain them.

Use account nicknames in shared notes. Agree a secure document channel before sending tax identifiers, full account numbers or identity documents.

4 Questions to resolve with your adviser

- ☐ **Residence:** What facts control my status in each country, and which dates remain uncertain?
- ☐ **Assets & cash:** Which assets need valuations or cost records? What tax and cash-flow questions follow?
- ☐ **Forms & accounts:** Which filings, elections, provider updates and contribution changes apply to me?
- ☐ **NR73 & follow-up:** Would a CRA residency opinion be useful? What changes should trigger a new review?

5 Agree the next three actions

Action / decision or missing record	Responsible person	Due / review date

Keep the preparation together. Preview a sample or start your free plan.
[exitcanada.app/sample-plan](#) | [exitcanada.app/start](#)

CRA references: [Leaving Canada](#) | [Dispositions of property](#) | [Form NR73](#)
Prepared 13 September 2026. Confirm current guidance and tax-year-specific forms with your adviser.