

INFORMATION FOR U.S. NON-RESIDENT INDIVIDUAL TAX RETURN (FORM 1040NR)

Year _____

Client Name _____

U.S. Taxpayer Identification Number (SSN or ITIN), if any. _____ What year did you obtain your ITIN? _____

 Did you receive an ITIN renewal notice from the IRS if you have a U.S. ITIN? Yes / No *If Yes, please provide us a copy.*

Country issuing your passport _____ Country of residence for income tax _____

Country of Birth _____ If country of birth is not Canada, date you moved to Canada _____

 Will your spouse be filing a U.S. income tax return? Yes / No Spouse's U.S. Taxpayer Identification Number, if any. _____

Your dependent children's U.S. Tax Identification Number, if any. _____

 Have you ever been a U.S. citizen? Yes / No Was one of your parents ever a U.S. citizen? Yes / No
If you previously held a U.S. citizenship and renounced, please provide the date you renounced your U.S. citizenship and provide us with a copy of the DS-4083 Certificate of Loss of Nationality of the United States.

 Have you ever held a U.S. Green Card? Yes / No If Yes, date you received U.S. lawful permanent resident status. _____

 If No, have you applied for a Green Card? Yes / No If Yes, when did you apply for a Green Card? _____

If you previously held a U.S. Green Card, please provide the date you surrendered your Green Card and provide us with a copy of the Form I-407 Abandonment of Lawful Permanent Resident Status.

 Did you have any other U.S. visa on the last day of the tax year? Yes / No If Yes, Type of visa (e.g. B-1, F-1, H1B) _____

 Have you ever changed your U.S. immigration visa type? Yes / No If Yes, please provide detail. _____

 Did you receive any gifts or bequests from individuals that previously were U.S. citizens or Green Card holder? Yes / No

 Have you ever filed a U.S. income tax return? Yes / No If Yes, Year(s) filed: _____ Form Number: _____

If Yes, please provide a copy of the most recent U.S. return unless prepared by us.

 Did you receive salary income from the U.S. during the year? Yes / No

 Did you receive any rental income from U.S. real estate during the year? Yes / No

 Did you sell U.S. real estate during the year? Yes / No

 Did you receive business income from the U.S. during the year? Yes / No

 Did you receive any other income from U.S. source during the year? Yes / No If Yes, Type of income _____

Please provide the following:

Number of days you were in the U.S. in the current calendar year (2018) _____

Number of days you were in the U.S. in the 1st preceding calendar year (2017) _____

Number of days you were in the U.S. in the 2nd preceding calendar year (2016) _____

Total number of days you were in the U.S. during the above 3 years _____