

Questionnaire

Canadians with U.S. Income

Personal Information

Tax Payer:

Name: _____

D.O.B: _____

Citizenship: _____

SSN/ITIN*: _____

Canadian Address: _____

Phone Number: _____ Email: _____

*If you don't have an ITIN, please send us a copy of your passport for the W-7 form, and follow the instructions to obtain a copy of a certified passport.

Have you ever tried to become a U.S. Citizen? Yes No

Were you a Green Card holder? Yes No

If you had an immigration Visa at the last day of 2025 please indicate what type: _____

Have you ever changed your Visa type? Yes No

Description of Visa change: _____

When was the last year you filed a U.S. tax return? _____

**If you travel to the US frequently for work, please check this box:
and DO NOT fill out the dates in the boxes below.**

For 2025 enter the dates you entered and departed the U.S.

Date Entered:

Date Returned:

Approximate number of days including vacation
spent in the U.S. in the following years:

2023 _____

2024 _____

2025 _____

*If filing for a previous tax year, please enter the dates you
departed/returned for that tax year, and the total number
of days for that year and the two years preceding.



Please include all / any tax documents for the tax year (1099, W2, etc.)

To request a portal for secure document uploads, please email rachael@statesidetax.com.