

Questionnaire

Canadians with a U.S. Property Sale

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? _____

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

Date Entered:

Date Entered:

Date Entered:

Date Departed:

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 for that year, and the total number of days for that year and the two preceding years.*

Date Purchased

Date Sold

Selling Price

Cost Basis

Improvements
During Ownership



Please include your settlement sheet. If FIRPTA taxes were withheld, please provide form 8288-A. If you do not have this form, please contact your withholding agent for a copy of it.

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