

# Questionnaire

## Canadians with U.S. Rental Income

### Personal Information

#### Tax Payer:

Name: \_\_\_\_\_ D.O.B: \_\_\_\_\_ Married: \_\_\_\_\_  
 Citizenship: \_\_\_\_\_ SSN/ITIN\*: \_\_\_\_\_ Y N  
 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 Returned:	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.

**Rental Units:** Ownership % \_\_\_\_\_

Date Purchased	Cost Basis	Cost of Improvements	Income	Expenses	# of days you occupied the property personally



**Please include the following: 1099s, 1098s, previous year US tax returns if filed before.**

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