

Questionnaire

U.S. Citizens Living In Canada

Personal Information

Tax Payer:

Name: _____

D.O.B: _____

Citizenship: _____

SSN/ITIN*: _____

Canadian Address: _____

Phone Number: _____ Email: _____

When was the last year you filed a U.S. tax return? _____ *Please provide a PDF copy of the last return filed.*

Spouse:

Name: _____

D.O.B: _____

Citizenship: _____

SSN/ITIN*: _____

Employment Income Exclusion

If you have Canadian employment income, we can exclude employment income on your U.S. return. To do so, we have to fill out a special form that includes additional information to prove you are a 'bona fide' resident of Canada. If you have employment income, please provide this information below:

A) Date you arrived to live & work in Canada: _____

B) Are you still a resident of Canada? Yes No

C) If you have previously filed Form 2555 (foreign earned income exclusion) with your return, what was the last year you filed this form?

D) Your Canadian employer: _____

Employer's Address: _____

E) Were you present in Canada for 12 months? Yes No

F) Employer is a Foreign Company U.S. Company

G) Enter the type of Visa which you entered Canada: _____

H) The type of living quarters you have in Canada: Purchased Rented

I) Does your family live with you in Canada? Yes No

Entire Family Some Family

J) Did you have rental properties in 2025? Yes No

Property: Cost Basis:

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RESPs / RDSPs

If you contribute to RESPs and/or RDSPs, the income or capital gains from your contributions are taxable on your U.S. return. There is also potential foreign trust reporting with these plans as well. Please ensure we understand the extent of your contributions and the details surrounding these accounts.

No RESP/RDSP

RESP/RDSP Included in package

TFSAs

Although, tax free savings accounts (TFSAs) are a tax-free savings in Canada, this is not the case for U.S. tax purposes. On your U.S. return, it is necessary to include income, gains/losses earned in your TFSA. Unfortunately, you will not get tax slips to make this easier. We suggest you ask your investment advisor to produce an income summary for the year.

Indicate TFSA income 2025 \$ _____ Were there PFICs within the TFSA? Yes _____ No _____

No TFSA

TFSA Included in package

Foreign Corporations

U.S. citizens owning at least 10% of a Canadian Corporation may be required to disclose details of the corporation to the IRS on a Form 5471 annually. There are significant penalties for failure to file this form.

No Foreign Corporations

Foreign Corporation Information Included in package

Foreign Trusts, Partnerships and Gifts

U.S. citizens are also subject to additional filing obligations with regard to contributions to and ownership of foreign partnerships, foreign trusts and gifting in excess of certain amounts. If you are a beneficiary or a trustee of a trust, or if you have made any transfers of any kind to a trust, please let us know. Also, if you have received or given any significant gifts of either cash or assets during the year, please let us know. Lastly, if you are a partner (directly or indirectly) in a partnership, please ensure we understand the details.

No Foreign Trusts/Partnerships/Gifts

Information on Foreign Trusts/Partnerships/Gifts Included in package

Fin CEN Report 114

U.S. citizens who have a financial interest in or signature or other authority over any "financial accounts" in a foreign country (Canada) are required to make a separate filing if the aggregate value of these accounts exceeded \$10,000 at any time during a taxation year. Note: the \$10,000 threshold does not apply to each account separately. For example if you have 6 accounts that all had \$2,000, each bank account may not exceed \$10,000, but the sum of the accounts is \$12,000 and would therefore still require an FBAR filing.

Accounts to include in the FBAR:

- Bank Accounts
- Investment Accounts
- RRSP
- TFSA
- Corporate Accounts with signing authority
 - Include Organization name and address



Please include the following: Full Canadian tax return, TFSA income, 1099s, W2s, 1042s

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