

**Tax Questionnaire for US
1040NR Return (real
estate income)
For the Year _____**



Donnelly & Co. LLP
Chartered Accountants

In addition to this questionnaire, please provide us with a copy of your previous year Canadian and US tax returns and your current Canadian tax return if we are not preparing it.

Name: _____

Address: _____

Phone numbers: _____

Email addresses: _____

US Taxpayer Identification Number (if any): _____

Birth Date: _____ Marital Status: _____

Country of Citizenship: _____

Country of Birth: _____

Did you have a "green card" during the year? _____ YES _____ NO If yes, date received: _____

If no, have you applied for a green card? _____

Do you have any other US visas? If so, type and visa number: _____

Country issuing your passport: _____

Country of residence: _____

Were you ever a US citizen or US resident? _____ YES _____ NO

List all dates you entered and left the US during the calendar year:

Purpose of your visit to the US: _____

Please provide the following:

Number of days you were in the US in the current year: _____

Number of days you were in the US in the preceding
year: _____

Number of days you were in the US in the 2nd
preceding year: _____

Have you ever filed a US income tax return? _____ YES _____ NO

If yes, please give last year and type of return: _____

US REAL ESTATE OWNED OR SOLD

For each US property you owned or sold during the year, please attach a copy of the Deed and Settlement Statement (Closing Statement) from the purchase. If we have not prepared a US return for you in the past, please complete the following for the property as well:



Type of Property: _____ Date Purchased: _____
 The property is owned: _____ Solely by you _____ Jointly with your spouse _____ Other
 Property Address: _____
 Cost: _____

US Real Estate Rentals or Property Sold

Address: _____
 Number of days during the year the property was: a) Leased _____ b) Used personally _____
 c) Vacant _____

Rental Income: _____	
Advertising: _____	Legal Fees: _____
Cleaning & Maintenance: _____	Tax Return fees: _____
Commissions: _____	Repairs: _____
Insurance: _____	Utilities: _____
Interest: _____	Real Estate Taxes: _____
Other Expenses: _____	

Please indicate if values are provided in US or CDN dollars and if values represent 100% of revenue and expenses or only your share.

Did you sell US real estate during the year? _____ YES _____ NO
 Property address: _____
 Date sold: _____ Selling Price: _____
 It was owned: _____ Solely by you _____ Jointly with your spouse _____ Other

Please provide all expenses paid during the current year up to the date of sale (Please provide above or on a separate sheet of paper).

Please attach a copy of the Sales Contract and Statement of Adjustments for both the purchase and the sale of the property and also IRS Form 8288-A, if any.

Other US Income

Did you receive any other income from US sources other than real estate income? _____ YES _____ NO
 If yes, please describe, including payor and amount: _____