

**Tax Questionnaire for US
Citizens Living in Canada
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.

	Primary Taxpayer	Spouse
Name	_____	_____
Social Security Number	_____	_____
Date of Birth	_____	_____
Profession	_____	_____
Country of citizenship	_____	_____
US Green Card Holder?	_____	_____

Did you file a joint US return with your spouse last year? _____ YES _____ No _____ N/A

Did your marital status change this year? _____ YES _____ No _____ N/A

Indicate any US states where you filed a tax return last year: _____

Contact Information:

Email Address _____

Phone Number(s) _____

Address _____

Dependent Children's Names, Gender, Dates of Birth and Social Security Numbers:

Information:

1. Date you arrived to live and work in Canada: _____
2. Kind of living quarters (purchased house, rented) _____
3. If you were present in the US during the calendar year, please fill in the following information for each trip to the US.

Date Arrived in US	Date Departed US	Days in US on Business	Income Earned



4. Are there any contractual terms relating to your length of employment abroad (if yes, explain):

5. Type of visa under which you entered the country: _____

6. Did you maintain a home in the US while living abroad: _____ YES _____ NO _____ N/A

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

Earned Income Information:

Please provide all T4s or W2s for both taxpayer and spouse. Please indicate if employer is a Canadian Company or US Company.

Self Employed or Independent Contractor:

Please provide the following information:

Type of Business _____

Business Name _____

EIN Number (if any US ID #) _____

Ownership _____

_____ Husband _____ Wife _____ Joint

If self-employed in business, please complete a statement of income and itemized expenses for the business for this calendar year.

Rental Income and Expenses:

If you own a rental property (in US, Canada or abroad), please attach a sheet showing all income and summarized expenses for the year. If this is the first year we have prepared your return, we will need the date the rental began, amount paid for the property, amount allocable to land, any major improvements, and a copy of the previous depreciation schedule if previously depreciated (Our website has a rental worksheet for your use).

Non Earned Income:

Please include all interest, dividends, capital gain and other income (social security, gambling winnings, alimony, etc).

Deductions:

Please describe deductions, amounts paid, and dates paid. If a deduction does not apply to you, leave blank or indicate N/A. Please indicate if expenses are in CDN or US dollars.

Medical and Dental Expenses: _____

Interest on mortgage: _____

Property taxes paid: _____

US Charitable donations to US Charities: _____



Investment interest expense: _____

Tax preparation fees paid during the year: _____

Interest on student loans (provide details): _____

Tuition and other expenses (provide details) _____

ADDITIONAL FORMS THAT MAY BE REQUIRED:

1. The IRS requires special forms to be filed by any US taxpayer who owns all or part of a foreign corporation, partnership, or trust. Please indicate here if you are an owner of a foreign corporation, partnership or trust and we will request additional information to complete these forms.

_____ YES _____ No

If yes, please describe: _____

2. New Requirement for 2011 and Future Years: There is a new reporting requirement for individuals who have "Specified Foreign Financial Assets" in excess of certain levels. Specified Foreign Financial assets include the following:

- Deposit or custodial accounts (such as bank accounts) at a foreign financial institution, including certain retirement accounts;
- Any equity or debt interest in a foreign financial institution;
- Other foreign investments such as stock issued by non-US persons, any interest in a foreign entity and any financial instrument issued by a non-US person;
- Foreign real estate is NOT a specified foreign financial asset and you do not have to count it.

If your foreign financial assets (including foreign bank accounts) exceed the following levels, this form is required:

	Value on last day of year is at least:	At any time of the year, value is greater than:
Taxpayers not filing jointly who live outside the US and qualify for the earned income exclusion.	\$200,000	\$300,000
Taxpayers filing jointly who live outside the US and qualify for the foreign earned income exclusion.	\$400,000	\$600,000



3. Treasury form TDF 90.22-1 requires reporting of foreign bank accounts. **This form is filed separately from your tax return and you can complete it on your own.** This form is due no later than June 30th. If you would like us to prepare this form on your behalf, please provide us the following information for each account that you are the owner of or having signing authority on (including securities, RRSPs, TFSA's, RSPs).

Name of Bank or Institution: _____

Address of Bank: _____

Account Number: _____

Highest Balance of Account in USD
during the year: _____

Type of Account (securities, pension, bank, etc): _____

Indicate if your spouse is co-owner or list
name, address, SSN of co-owner if not spouse: _____

Name of owner if you only sign on account: _____

General Information:

US Citizens living abroad are given an automatic extension to file their tax return until June 15, however, if any taxes are owed, the money is due April 15th if you wish to avoid possible penalties and interest.