

US Non-resident Alien Tax Questionnaire 2011

Identification

Name _____ US taxpayer # _____
If you don't have one, complete an ITIN application (call us for form W-7).

c/o _____

Street _____ Date of birth (mm-dd-yy) _____

City _____ Province _____ Marital status _____

Postal Code _____ Tel # _____ E-mail _____

Spouse and dependents

Name	US ID# (or W-7 required)	Relationship	Date of Birth (mm-dd-yyyy)	# of months @ home /school
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Are any of your children US citizens or residents? A resident is usually a green-card holder, but if an individual spends enough time in the United States over a 3-year period, s/he may be considered a US resident for tax purposes.

Did your spouse have any US-source income, including interest or dividends?

Did your spouse contribute more than 50% of the support for any of these dependents? If so, please indicate which.

YES

US-source effectively connected income or loss

Do not include portfolio income such as interest, dividends and capital gains (aside from gains on real estate). Please check all that apply:

Non-resident alien status, using the Canada-US treaty.

Employment income: Please attach all W-2 forms. If you were on a Canadian payroll, please attach all T4 forms relating to US work. Indicate number of days in US for employment _____ and days worked in total (usually around 240) _____

Business income with no US permanent establishment ("PE"): Please provide two figures: Gross revenue and net income, and indicate the currency used.

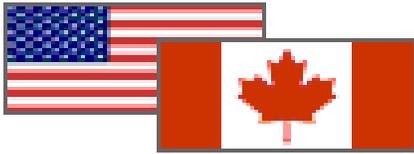
Rental property

Real property sold: Provide form 8288-A, the statement of adjustments for each of the purchase and sale, and the cost of improvements. If the real property was owned before 1980, please provide value as of Dec 31, 1984.

Gambling winnings: Please attach the form listing your winnings and tax withheld. Indicate the amount of your losses:

Partnerships: Please list those in which you have invested, and attach your form K-1 for each:

If you are filing a California return, please provide us with a copy of your Canadian income tax return, or with an estimate of the figures that will be listed on it.



Non-resident Alien Questionnaire Days in the United States

Name _____

- Highlight or circle to indicate days physically spent in the United States. Any portion of a day in the US counts as a full day. The purpose of the presence does not matter.
- If more than 75% of your **work** days were in the US, you don't have to complete this page. The 75% test is computed using your "working period". A working period is the time frame where you are regularly required to be in the US. It does not have to be a whole year, and you may have more than one working period in a year. Normally this test is meant for people who commute to work in the US. IF you're not sure whether you meet this test, please complete the calendar.

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ACCOUNTING > CONSULTING > TAX

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**US Non-resident Alien Tax Questionnaire
2011
Disclosure of Treaty-based Residency**

Place an "x" in each box that applies:

1) I had a permanent home (including a rental unit) in:

2a) I had strong personal ties to:

Personal ties are principally immediate family, including children living with you. Secondary ties are club memberships, religious and political affiliations and the like.

2b) I had strong economic ties to:

Economic ties are primarily where you physically make your living. If your investment income is substantial in comparison with your earned income, then the location of your financial advisor(s) and investments may be significant. Otherwise they are secondary.

3) I had a habitual abode in:

A habitual abode is one where you regularly spend a considerable period of time; a place you sleep at often.

4) I was a citizen of:

Canada	About the Same	United States

Notes:

**RENTAL REAL ESTATE
2011**

Address of rented property: _____

Usage

Number of days rented at fair market value: _____
 Number of days used personally or rented for less than fair market value: _____
 Number of days available for rent but not rented out: _____

 Total number of days (usually 365): _____

Revenue

CAN\$ US\$

Rent		
Parking		
Other		
 Total		

Expenses

Advertising				
Automobile				
Cleaning and maintenance				
Commissions				
Insurance				
Management fees				
Mortgage interest (on this property only)				
Other interest				
Was this loan secured by assets located outside the US?	YES	NO		
Professional fees				
Realty taxes				
Repairs				
Supplies				
Travel				
 Utilities				

 Total				

Capital assets

**Date
Acquired**

Cost

Land		
Building		
Furniture		
Other		