

CLIENT INFORMATION

1. Full Name (per SSA Card): _____
2. Preferred Name: _____
3. Legal Gender: Male Female
4. Date of Birth: _____
5. Phone Number: _____
6. Email Address: _____
7. Secondary Email Address: _____
8. Preferred Method of Contact: _____
9. Preferred Days/Time: _____
10. Time Zone: _____
11. Mailing Address: _____
City: _____ Province/State: _____
Postal/Zip Code: _____ Country: _____
12. Residing Address (If Different): _____
City: _____ Province/State: _____
Postal/Zip Code: _____ Country: _____
13. Marital Status as of Dec 31st: Single Married
 Common-Law Separated Divorced
 Widowed
14. Did your marital status change in the year?
 Yes No If yes, date of change? _____
15. If married:
 - a. Spouse Full Name: _____
 - b. Spouse Date of Birth: _____
 - c. Spouse US Tax ID (if applicable): _____
 - d. Spouse Foreign Tax ID (if applicable): _____
 - e. Spouse Email: _____
16. Do you have a bank account in the United State and authorize direct deposit with tax authorities?
 Yes No
17. Do you authorize direct debit? Yes No
18. If yes, please provide the following bank information:
Bank Name: _____
Account Number: _____
Routing Number: _____

PLEASE COMPLETE THE FOLLOWING PAGES AS APPLICABLE.**CITIZENSHIP / RESIDENCY**

1. Are you a US Citizen? Yes No
2. Are you a green card holder? Yes No
If you answered yes to either question above, you are not eligible to file a non-resident return. Do not continue to fill out this form and contact us.
3. Have you ever been a US Citizen? Yes No
4. Country of citizenship: _____
5. Have you ever applied for a green card? Yes No
6. Country of Residence: _____
7. Do you have a US Social Security Number? Yes No
8. Social Security Number: _____
9. Did you receive an IP PIN letter from the IRS in January? Yes No
If yes, please upload letter to your client portal.
10. Do you have a US Individual Taxpayer Identification Number? Yes No
11. Individual Taxpayer Identification Number: _____

Please provide the following information if you want AET to prepare the ITIN application (Form W7) for you:

Birth Name (if different): _____	Legal Gender: Male Female
Country of Birth: _____	Passport Number: _____
Issuing Country: _____	Passport Expiry Date: _____
Visa Type: _____	Visa Number: _____ Expiry Date: _____

DEPENDENT INFORMATION

(Use additional pages as needed)

NOTE: Dependents may not be limited to just children

DEPENDENT ONE:

- | | |
|---|---|
| 1. Full Name: _____ | 6. Social Security Number: _____ |
| 2. Date of Birth: _____ | 7. Do they have a US ITIN? Yes No |
| 3. Relationship: _____ | 8. Individual Taxpayer Identification Number: _____ |
| 4. Number of Months Resided with Taxpayer: _____ | |
| 5. Do they have a US Social Security Number? Yes No | |

Please provide the following information if you want AET to prepare the ITIN application (Form W7) for **Dependent One**

Birth Name (if different): _____ Legal Gender: Male Female
Country of Birth: _____ Passport Number: _____
Issuing Country: _____ Passport Expiry Date: _____
Visa Type: _____ Visa Number: _____ Expiry Date: _____

DEPENDENT TWO:

- | | |
|---|---|
| 1. Full Name: _____ | 6. Social Security Number: _____ |
| 2. Date of Birth: _____ | 7. Do they have a US ITIN? Yes No |
| 3. Relationship: _____ | 8. Individual Taxpayer Identification Number: _____ |
| 4. Number of Months Resided with Taxpayer: _____ | |
| 5. Do they have a US Social Security Number? Yes No | |

Please provide the following information if you want AET to prepare the ITIN application (Form W7) for **Dependent Two**

Birth Name (if different): _____ Legal Gender: Male Female
Country of Birth: _____ Passport Number: _____
Issuing Country: _____ Passport Expiry Date: _____
Visa Type: _____ Visa Number: _____ Expiry Date: _____

DEPENDENT THREE:

- | | |
|---|---|
| 1. Full Name: _____ | 6. Social Security Number: _____ |
| 2. Date of Birth: _____ | 7. Do they have a US ITIN? Yes No |
| 3. Relationship: _____ | 8. Individual Taxpayer Identification Number: _____ |
| 4. Number of Months Resided with Taxpayer: _____ | |
| 5. Do they have a US Social Security Number? Yes No | |

Please provide the following information if you want AET to prepare the ITIN application (Form W7) for **Dependent Three**

Birth Name (if different): _____ Legal Gender: Male Female
Country of Birth: _____ Passport Number: _____
Issuing Country: _____ Passport Expiry Date: _____
Visa Type: _____ Visa Number: _____ Expiry Date: _____

ADDITIONAL INFORMATION

1. Did you earn more than \$250,000USD last year? Yes No
2. Did you receive any other income from US Payers? Yes No
3. Do you own any US Stocks, Mutual Funds or ETFs in any account/country? Yes No
4. On what type(s) of visa(s) did you enter the US in the year?

5. Do you commute to the US to work? Yes No

If yes - **complete part 2 only**

If no - **complete part 1 and part 2** on the next page.

PART ONE: Please enter dates you arrived and left the US for business/work.

Please provide AET with a copy of your I94 travel history.

US Entry Date	US Exit Date	US Entry Date	US Exit Date	US Entry Date	US Exit Date
1.		10.		19.	
2.		11.		20.	
3.		12.		21.	
4.		13.		22.	
5.		14.		23.	
6.		15.		24.	
7.		16.		25.	
8.		17.		26.	
9.		18.		27.	

PART TWO: For each tax year to be filed, please specify the number of days you spent in the US during that year, as well as the two preceding years. Include all types of days, such as vacations, non-workdays, and partial days.

i.e. For a 2025 tax return, please indicate your 2025, 2024 and 2023 days of US presence.

2025 _____ 2024 _____ 2023 _____ 2022 _____ 2021 _____ 2020 _____

Enter number of US days for only the years that apply to your situation: