

Engagement Questionnaire

For US Returns

Name: _____ SSN#/ITIN# _____
Address: _____ Date of Birth _____
(mm/dd/yyyy)
City: _____ Province/State: _____ Postal/Zip Code: _____
Main phone: _____ Cellular Phone: _____ Time Zone _____
Alternate phone: _____ Email: _____

*****For any question which you are unsure of the answer, enter a question mark*****

Citizenship: Check all that apply

US Citizen ___ Canadian Citizen ___ Green Card Holder ___ Other _____

What was the last year you filed a US tax return? _____ FBAR? _____

Marital Status on December 31st:

Single (never married) _____ Common-law _____ Married _____ Separated _____ Divorced _____

Widowed _____ What year did you become a widow(er)? _____

Did your marital status change at any time during the last tax year? _____

Please answer all questions :

1. Are you claiming any dependents? _____ If yes, how many? _____
2. Have you moved in the last calendar year? _____
If yes, did you move outside of your country of residence? _____
3. Are you self-employed? _____ If yes, is the business incorporated? _____ A partnership? _____
Is your spouse self-employed? _____ If yes, is the business incorporated? _____ A partnership? _____
4. Do you own rental property? _____
If yes, where is the property located? US _____ CAN _____ Other _____
5. Did you sell any property in the tax year (real estate, stock/bonds/mutual funds, etc.)? _____
6. Do you own a retirement/pension plan outside of the US? _____
7. Are you the executor of an estate? _____
8. Do you own or contribute to accounts outside of the US? _____
If yes, did the total aggregate value of these accounts exceed \$10,000.00? _____

Client Name: _____

Additional Comments:

Slips and Information Sent to AET - Summary: