

Client Questionnaire US-NR

Client Name _____ **Date** _____ mm/dd/yyyy

Mailing address _____

Residing Address (if different) _____

Other Address (if applicable) _____

Home Phone _____ Cellular Phone _____ Other Phone _____

Email _____ Alternate email _____

Preferred Method of Contact: Phone Email Skype Other _____

Preferred Days/Times _____ Time Zone _____

Citizenship/Residency:

1. US Citizen? YES NO Have you ever been a US Citizen? YES NO

2. Green Card Holder? YES NO Have you ever applied for a green card? YES NO

If you answered yes to questions 1 or 2, you are not eligible to file a non-resident return. Do not continue to fill out this form. Please contact your tax professional for a more thorough interview to determine any and all US filing obligations and the best way to file.

Country of Citizenship _____ Country of Residence _____ Date of Birth _____ mm/dd/yyyy

An ITIN or SSN is required for this return:

Do you have a **US Social Security Number (SSN)**? YES NO

SSN Number if yes: _____

Do you have a **US Individual Taxpayer Identification Number (ITIN)**? YES NO

ITIN Number if yes: _____

Please provide the following information if you want us to prepare the ITIN application for you:

Passport number _____ Issuing Country _____ Expiry Date _____ mm/dd/yyyy

Visa Type _____ Number _____ Expiry Date _____ mm/dd/yyyy

Country of Birth: _____ Are you: Male _____ Female _____

Birth Name (if different) : _____



Client Name: _____

Marital Status on December 31st:

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

If Married – Spouse’s Name _____

Other Information - Please fill out completely

Do you commute to the US to work? Yes _____ No _____

If "Yes" complete Part 2 only

If "No" complete Part 1 and Part 2

Part 1: Please enter dates in mm/dd/yyyy format.

Date Entered US	Date Left US		Date Entered US	Date Left US

Part 2:

Number of Days

For each tax year to be filed, please state the number of days you were in the US during that tax year and each of the two years prior. Include vacation, non-work days, and partial days.

Specifically, for a 2019 tax return, please indicate your 2019, 2018 and 2017 days of US presence.

For a 2018 tax return, indicate 2018 2017, and 2016 days of presence.

For a 2017 tax return, indicate 2017, 2016, and 2015 days of presence.

For a 2016 tax return, indicate 2016, 2015, and 2014 days of presence.

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

2019 _____ 2018 _____ 2017 _____

2016 _____ 2015 _____ 2014 _____

Did you earn more than \$250,000 last year? Yes _____ No _____

Did you receive any other income from US payers? Yes _____ No _____

Did you own any US Stocks, Mutual Funds or ETFs? Yes _____ No _____

Additional Information: