

Name _____ SSN#/ITIN# _____

Date of Birth _____ Email _____

Spouse Name _____ SSN#/ITIN# _____

Date of Birth _____ Spouse Email _____

Address _____

City _____ Province/State _____ Postal/Zip Code _____

Main phone _____ Cellular Phone _____ Time Zone _____

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

Citizenship: (Check all that apply)

You:

US Citizen Canadian Citizen Green Card Holder Other _____ Visa Type? _____

Spouse:

US Citizen Canadian Citizen Green Card Holder Other _____ Visa Type? _____

Marital Status on December 31st:

Single Common-Law Married Separated Divorced Widowed Changed this year? _____

Please answer all questions:

1. Are you claiming any children/dependents? _____ If yes, how many? _____
2. Did your family situation change in the year? If so, explain _____
3. Have you moved in the last calendar year? _____
If yes, did you move to a new tax jurisdiction (state/province/country)? _____
4. Did you change where/how you perform your work due to Covid or other reasons? _____
5. Are you working from home? _____
6. Did you make any energy efficient improvements to your principal residence prior to 2022 (located in the US only)? _____
7. Are you self-employed? _____ If yes, is the business incorporated? _____ A partnership? _____
8. Is your spouse self-employed? _____ If yes, is the business incorporated? _____ A partnership? _____
9. Do you own rental property? _____
If yes, where is the property located? US CAN Other _____
10. Did you earn investment income from assets (stocks/mutual funds/ETFs) outside of the US? _____

11. Did you purchase, sell, mine, trade, own, acquire crypto/virtual currency? _____
12. Did you sell any property in the tax year (real estate, stock/bonds/mutual funds, etc.)? _____
13. Do you own a retirement/pension/education plan outside of the US? _____
14. Are you currently the executor of an estate? _____
15. Did you make any gifts over \$16,000USD? _____
16. Did you receive a gift/bequest/inheritance? _____ Over \$100,000USD? _____
17. Do you own, have signing authority on or contribute to financial accounts outside of the US (see [FBAR Quicksheet](#))? ____ If yes, did the total aggregate value of these accounts exceed \$10,000 USD? _____
18. Do you have a bank account located in the US? ____ If yes, do you authorize direct deposit/debit with the IRS/state? _____
19. Did you make any estimated tax payments to the IRS or to a State Tax Authority during the year? _____
If yes, please provide proof of payment(s).

Additional Comments:

Slips and Information Sent to AET - Summary: