

Non-Resident Questionnaire

For US Returns

Date ____/____/____

Client Information

Full Name _____

Preferred Name _____

Legal Gender Male Female

Date of Birth _____

Mailing Address _____

City _____ State _____ Zip Code _____

Country _____

Residing Address (if different) _____

City _____ State _____ Zip Code _____

Country _____

Other Address (if applicable) _____

City _____ State _____ Zip Code _____

Country _____

Contact Information

Cellular Phone Number _____

Other Phone Number _____

Email Address _____

Secondary Email Address _____

Preferred Method of Contact _____

Preferred Days/Time _____

Time Zone _____

Marital Status as of December 31st

Single Married Common-Law Separated Divorced Widowed

If married:

Spouses Full Name _____

Spouse Birthdate _____

Spouse US Tax ID (if applicable) _____

Spouse Foreign Tax ID (if applicable) _____

Citizenship/Residency

Are you a US Citizen? Yes No

Are you a green card holder? Yes No

If you answered yes to any of the two questions above, you are not eligible to file a non-resident return. Do not continue to fill out this form and contact us.

Have you ever been a US Citizen? Yes No

Have you ever applied for a green card? Yes No

Country of Citizenship _____

Country of Residence _____

An ITIN or SSN is required for this return.

Do you have a US Social Security Number? Yes No

If yes, SSN Number _____

Do you have a US Individual Taxpayer Identification Number (ITIN)? Yes No

If yes, ITIN Number _____

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

Passport Number _____ Issuing Country _____ Expiry Date _____

Visa Type _____ Visa Number _____ Expiry Date _____

Country of Birth _____ Gender Male Female

Birth Name (if different) _____

Additional Information

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 you arrived and left the US for business/work and provide AET a copy of your I94 travel history.

Date Entered US	US Exit Date		Date Entered US	US Exit Date

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-workdays, and partial days.

Specifically, for a 2023 tax return, please indicate your 2023, 2022 and 2021 days of US presence.

For a 2022 tax return, indicate 2022, 2021 and 2020 days of US presence.

For a 2021 tax return, indicate 2021, 2020, and 2019 days of presence.

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

2023 _____ 2022 _____ 2021 _____
 2020 _____ 2019 _____ 2018 _____

On what type(s) of visa(s) did you enter the US in the year? _____

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

Did you receive any other income from US Payers? Yes No

Do you own any US Stocks, Mutual Funds or ETFs in any account/country? Yes No

Additional Comments: