

# Simplified Questionnaire

For US Returns

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

## Client Information

Taxpayer	Spouse
Full Name _____	Full Name _____
Preferred Name _____	Preferred Name _____
Legal Gender _____ Male _____ Female _____	Legal Gender _____ Male _____ Female _____
Disabled _____	Disabled _____
Date Of Birth _____	Date Of Birth _____
SSN#/ITIN# _____	SSN#/ITIN# _____
Select all that apply:	Select all that apply:
<input type="checkbox"/> US Citizen	<input type="checkbox"/> US Citizen
<input type="checkbox"/> Canadian Citizen	<input type="checkbox"/> Canadian Citizen
<input type="checkbox"/> Green Card Holder	<input type="checkbox"/> Green Card Holder
<input type="checkbox"/> Other _____	<input type="checkbox"/> Other _____
Visa Type _____	Visa Type _____
Email Address _____	Email Address _____
Phone Number _____	Phone Number _____
Address _____	
City _____ State/Province _____ Zip/Postal Code _____	

**\* For any questions which you are unsure of the answer, please enter a question mark. \***

### Marital Status as of Dec 31st:

Single     Married     Common-Law     Separated     Divorced     Widowed

Changed this year?  Yes  No                      If yes, Date of Change \_\_\_\_\_

**Please answer all questions below.**

For any questions which you are unsure of the answer, please enter a question mark.

Are you claiming any children/dependents?

Yes  No

Childcare Expenses?

Education Expenses?

Disabled?

Have you moved in the last calendar year?  Yes  No

If yes, to a new state/province/country?

Yes  No

If yes, prior state/province/country \_\_\_\_\_

Did you change where/how you perform your work

due to Covid or other reasons?  Yes  No

Are you working from home?  Yes  No

Are you self-employed?  Yes  No

Is the business incorporated?  Yes  No

If yes, in what country? \_\_\_\_\_

Is it a partnership?  Yes  No

If yes, in what country? \_\_\_\_\_

Are you currently the executor of an estate?

Yes  No

Did you make any gifts over \$16,000USD?  Yes  No

Did you receive a gift/bequest/inheritance?

Yes  No

Over \$100,000USD?  Yes  No

Do you own a retirement/pension/education plan

outside of the US?  Yes  No

Do you own/have signing authority on or contribute to

financial accounts outside of the United States (see

[FBAR Quicksheet](#))?  Yes  No

Did the total combined value of these accounts

exceed \$10,000 USD?  Yes  No

Did you sell any property in the tax year (real estate,

stock/bonds/mutual funds, etc.)?  Yes  No

Did you make any energy efficient improvements to

your principal residence prior to 2023 (located in the

United States only) ?  Yes  No

Are you claiming any children/dependents?

Yes  No

Childcare Expenses?

Education Expenses?

Disabled?

Have you moved in the last calendar year?  Yes  No

If yes, to a new state/province/country?

Yes  No

If yes, prior state/province/country \_\_\_\_\_

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Are you currently the executor of an estate?

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Did you sell any property in the tax year (real estate,

stock/bonds/mutual funds, etc.)?  Yes  No

Did you make any energy efficient improvements to

your principal residence prior to 2023 (located in the

United States only) ?  Yes  No

Do you own rental property?\_\_ Yes \_\_ No

If yes, where is the property located?

US  CAN  Other \_\_\_\_\_

Did you earn investment income from assets (stocks/mutual funds/ETFs) outside of the US?

Yes  No

Did you purchase, sell, mine, trade, own, acquire crypto /virtual currency?\_\_ Yes \_\_ No

Do you have a bank account located in the United States and authorize direct deposit /debit with the IRS/State?\_\_ Yes \_\_ No

If yes, please provide:

Bank Name \_\_\_\_\_

Account Number \_\_\_\_\_

Routing Number \_\_\_\_\_

Did you make any estimated tax payments to the IRS or to a State Tax Authority during the year?

Yes  No

*If yes, please upload proof of payment(s) to your client portal.*

**Additional Comments:**

Do you own rental property?\_\_ Yes \_\_ No

If yes, where is the property located?

US  CAN  Other \_\_\_\_\_

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Yes  No

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**Additional Comments:**