

Date _____

Shareholder Name: _____ Mailing Address: _____

City: _____ State: _____ Postal/Zip Code: _____ Country: _____

Residing Address (if different) : _____ City: _____

State: _____ Postal/Zip Code: _____ Country: _____ Home Phone

Number: _____ Cell Phone Number: _____ Email Address: _____

Marital Status as of Dec 31st: Single Married Common-Law Separated Divorced Widowed

Did your marital status change this year? Yes No If yes, Date of Change? _____

Spouse Name (if applicable): _____

Shareholder (currently or in prior years):

1. Are you a US Citizen? Yes No If previously a US Citizen, what year did you renounce? _____

2. Do you have a green card? Yes No Year status was acquired: _____ Year expired: _____

If you previously had a green card, in what year did you surrender (completed form i-407)? _____

3. Do you have a US Visa? Yes No Type: _____ Date status was acquired: _____

Expiry date: _____

4. Are you a Canadian citizen? Yes No Are you a Canadian Permanent Resident? Yes No

Visa type: _____ Date status was acquired: _____ Date residency in Canada

was established: _____ Date residency was terminated: _____

5. Date VOTG/Pinetree shares were purchased: _____

1. Do you commute to the US to work? Yes No

2. What was the number of days (for any purpose) that you were in the US during each year (include any partial days)? 2022 _____ 2023 _____ 2024 _____

3. What type of US return was filed in each year (1040, 1040NR, Form 8840 only, none)?

2021 _____ 2022 _____ 2023 _____

4. Did you file Canadian resident return(s) in each year (T1/TP1)?

2021 _____ 2022 _____ 2023 _____

Spouse (currently or in prior years):

1. Are you a US Citizen? Yes No If previously a US Citizen, what year did you renounce? _____
2. Do you have a green card? Yes No Year status was acquired: _____ Year expired: _____
If you previously had a green card, in what year did you surrender (completed form i-407)? _____
3. Do you have a US Visa? Yes No Type: _____ Date status was acquired: _____
Expiry date: _____
4. Are you a Canadian citizen? Yes No Are you a Canadian Permanent Resident? Yes No
Visa type: _____ Date status was acquired: _____ Date residency in Canada
was established: _____ Date residency was terminated: _____
5. Date VOTG/Pinetree shares were purchased: _____

1. Do you commute to the US to work? Yes No
2. What was the number of days (for any purpose) that you were in the US during each year (include any partial days)? 2022 _____ 2023 _____ 2024 _____
3. What type of US return was filed in each year (1040, 1040NR, Form 8840 only, none)?
2021 _____ 2022 _____ 2023 _____
4. Did you file Canadian resident return(s) in each year (T1/TP1)?
2021 _____ 2022 _____ 2023 _____

Matters you would like to discuss during the appointment: