

Income Tax USA

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Client Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Date Of Birth: \_\_\_\_\_

Canadian Citizen   Y   N   SIN Number: \_\_\_\_\_

US Citizen   Y   N   US Social Security Number: \_\_\_\_\_

Marital Status: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Date Of Birth: \_\_\_\_\_

Canadian Citizen   Y   N   SIN Number: \_\_\_\_\_

US Citizen   Y   N   US Social Security Number: \_\_\_\_\_

Visa Type: \_\_\_\_\_

Type Of Return:      1040NR      1040NR-Treaty Based

US Banking Information

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

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

Type Of Account:      Chequing      Savings

	Child 1	Child 2	Child 3	Child 4
First Name				
Last Name				
Date Of Birth				
Canadian Citizen	Y N	Y N	Y N	Y N
US Citizen	Y N	Y N	Y N	Y N
Sin Number				
US Social Security Number				

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

If the Taxpayer is a US citizen than please Obtain the following information:

Property Taxes Paid: \_\_\_\_\_

Mortgage Interest Paid: \_\_\_\_\_

If the taxpayer is the higher income earner and is married, would they like to have their return calculated as: Single Married Filing Separately Head of Household Joint Filing

An additional charge will apply, this charge will be based on our hourly rate Billed closest to 10 minuets, If yes please have taxpayer Initial.

Taxpayer Initial: \_\_\_\_\_

If the taxpayer is a US citizen, Would they like our assistance in calculating their FBARS which are required to be filied annually by all US citizens living abroad. Y N

An additional charge will apply, this charge will be based on our hourly rate billed closest to 10 minuets, If yes please have taxpayer Initial.

Taxpayer Initial: \_\_\_\_\_