

2013 TAX PREPARATION INFORMATION SHEET

Part 1. PERSONAL INFORMATION							
1	Your First Name	M.I.	Last Name	Email address			
2	Spouse's First Name	M.I.	Spouse Last Name	Spouse's Date of Birth			
3	Use mailing address from Canada T1 Return? Yes No (If no, enter address on line 4)						
4	Street	City		Prov	Postal		
5	Your Phone #:	Spouse's Phone #:		I do not wish to enter a phone number on my US return			
6	Your Occupation			Spouse's Occupation			
7	Your US Social Security Number:			Your spouse's US Social Security Number:			
8	Click if you or spouse have an ITIN instead of a Social Security Number - Your ITIN			Spouse's ITIN			
9	On Dec 31 st 2013, were you: Single Legally Married Widowed: Date of spouses death:						
Divorced or Legally Separated: (Date of final decree or separate maintenance agreement)							
10	Are you totally and permanently disabled? Yes No			Is your spouse totally and permanently disabled? Yes No			
11	Can someone else claim you or your spouse as a dependent on their tax return? Yes No						
Part 2. FAMILY AND DEPENDENT INFORMATION – Do not include yourself or your spouse							
Please list all persons who lived in your home and anyone living outside your home that you or your spouse supported during 2013.							
	First and Last Name	Date of birth (mm/dd/yyyy)	Social Security Number or ITIN	Relationship to You (Son, Daughter, etc)	Number of months lived with you outside U.S. in 2013	Number of months lived with you in U.S. during 2013	Permanently and totally disabled in 2013
12							
13							
14							
Part 3. STATUS AND INCOME INFORMATION							
15	What is your U.S. status?			What is your Canadian status?			
16	Spouse's U.S status?			What is your spouse's Canadian status?			
17	What is the last year you filed a U.S individual income tax return with the IRS?				Spouse last filing year:		
18	US Passport status:			My spouse's US passport status:			
19	During 2013 in Canada, did you, Own a home, Rent a house or apartment, Housing furnished by an employer Please enter date you established your tax home in Canada.						
20	Yes	No	Did you own a home in the U.S. during 2013?		Yes	No	
21	Yes	No	Did you maintain a separate foreign residence for your family because of adverse living conditions at your tax home?				
22	Yes	No	Have you or your spouse ever claimed the foreign earned income exclusion or foreign housing exclusion on any U.S. tax?				
23	Yes	No	Are there any limitations as to your length of stay or type of employment in Canada?				
24	Yes	No	Did you or your spouse own any investments (real estate, bank accounts, securities, etc) in the U.S. during 2013?				
25	Yes	No	Did you or your spouse own any investments outside of Canada or outside of the U.S. during 2013?				
26	Yes	No	Did you travel to the U.S. during 2013? If yes, list date ranges on line below.				
27							
28	Yes	No	In 2013, did you or your spouse receive any US source income (wages, salaries, tips, scholarships, interest, dividends, gambling, lottery, etc)?				
29	Yes	No	In 2013, did you or your spouse sale any assets held in the US (stocks, bonds, real estate, etc)?				
30	Yes	No	In 2013, did you or your spouse receive any self employment income from a U.S. source (business, farm, hobby)?				
31	Yes	No	In 2013, did you or your spouse receive any disability income from a U.S source?				
32	Yes	No	In 2010, did you or your spouse receive any pensions, annuities, and/or IRA distributions from a US source?				
33	Yes	No	In 2013, did you or your spouse receive any US unemployment compensation (1099-G)?				
34	Yes	No	In 2013, did you or your spouse receive any US social security or railroad retirement benefits (1099-SSA or RRB)				
35	Yes	No	Are you required to file Form 8938 (do you own non-US financial assets of \$200k or more (single) or \$400k or more (joint))? Not Sure				
36	Yes	No	Have you or your spouse received any notices or communications from the IRS in the last 6 years?				
37	Yes	No	Have you or your spouse ever filed a FinCen 114 FBAR Form (formerly known as Form TD F 90-22.1) with the US Department of the Treasury?				
38	Yes	No	Are you or your spouse a direct or indirect shareholder of a Canadian Mutual Fund or a Passive Foreign Investment Company?				
39	Yes	No	Did you or your spouse own an RRSP or RRIF or receive any distributions from an RRSP or an RRIF or any foreign trust in 2013?				
40	Yes	No	Did you or your spouse hold or invest in an RESP or TFSA in 2013?				
41	Yes	No	Were you or your spouse officers, directors, or shareholders in a foreign (non-US) corporation or partnership in 2013?				
42	Yes	No	Did you or your spouse reside more than 179 days in the U.S. during 2013?				
CRTPro LLC Service Agreement							
This service agreement is entered into between you and, if applicable, your spouse, (the "User") and CRTPro LLC, (the "Provider"). Based on information provided by the User, the Provider shall prepare and provide to the User for its signature all applicable individual income tax forms required by the IRS. The User agrees to provide true, accurate, current and complete information about yourself to the Provider. The Provider shall not be responsible for any loss(es) or consequence(s) experienced as a result of the intentional or unintentional withholding of information from the Provider needed by it to properly perform its duties. If paper filing, the User shall be responsible for ensuring that all required tax forms are filed on a timely basis once received from the Provider. The Provider has no responsibility to discover errors or inaccuracies related to prior year(s) accountings or tax filings not prepared by the Provider. The Provider does not provide legal advice. Users that have not filed income tax returns or other required filings with the IRS in previous years may be subject to IRS penalties. It is the position of the Provider that Users who have not previously filed returns with the IRS when required to have done so, should file six of the most recent years of required tax filings with the IRS along with a letter to the IRS explaining their situation. Provider service charges are posted on the www.usatxfilings.com website and may change from time to time. Address of Administrator: CRTPro LLC, 53 Coachwood Rd W, Lethbridge, AB T1K6B3 and 406 N 1050 E, American Fork, UT 84003. Phone, 800-422-3316; Fax., 866-239-6781; Email, jeff@usatxfilings.com							
<div style="display: flex; justify-content: space-between;"> Your Signature _____ Date _____ Spouse's Signature (if filing a US return) _____ Date _____ </div>							