



2025 Individual Income Tax Questionnaire (1040NR U.S. Nonresident Alien)
(Taxpayers who are not US Citizens/Residents)

Name:		
Address:		
Date of birth:		
Social Security Number / ITIN:		
Marital status (Single/Married filing separately/ Qualifying surviving spouse):		
Occupation (as related to your activities in the U.S.):		
At any time during 2025, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	Yes	No
Of what country or countries were you a citizen or national during 2025?		
In what country did you claim residence for tax purposes during 2025?		
Were you ever:	Yes	No
A U.S. Citizen?		
A green card holder (lawful permanent resident) of the U.S.?		
If you had a visa on the last day of 2025, enter your visa type. If you did not have a visa, enter your U.S. immigration status on the last day of the tax year.		
	Yes	No
Have you ever changed your visa type (non-immigrant status) or U.S. immigration status?		
If "Yes", indicate the date and nature of change		

SENDING AND RECEIVING DOCUMENTS	Yes/Already Have	No
We have a secure online portal system where clients can send and receive their tax documents.		
Do you want access to our online portal?		
	Electronic PDF Copy	Printed Paper Copy
In which format do you want to receive your completed tax returns? (choose one only). (Please note there will be an additional charge if you wish to receive a copy in both formats)		

List all dates you entered and left the United States during 2025:

Give number of days (including vacation, non-workdays, and partial days) you were present in the United States during:

2023	
2024	
2025	

Give number of days (including vacation, non-workdays, and partial days) **you held a “F”, “J”, “M” or “Q” visa as a student, teacher or trainee** during:

2023	
2024	
2025	

Did you file a U.S. income tax return for any prior year? Yes/No _____

If “Yes”, give the last year and form number filed	
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Did you work in any US state(s) during 2025? Which state(s)? _____

If we are not preparing your Canadian tax return (T1), please provide us with a copy of your return.	
Please provide copies of tax slips with U.S. source income (W-2, 1042-S, 8288-A, 1099 etc.)	

For the 2025 tax year and onward, the IRS no longer issues paper refund checks. Refunds are issued electronically only. If you expect a U.S. tax refund, please provide U.S. bank account details to avoid delays.

ELECTRONIC FILING OF TAX RETURNS

("U.S. tax return" refers to both your US Federal and State tax returns as applicable).

We have U.S. tax preparation software which allows tax return preparers operating outside the U.S. to electronically file their client's U.S. tax return. If your U.S. tax return is prepared using this new software and is eligible for electronic filing, we will provide you with a copy of the tax return electronic filing consent form(s) to sign and return to us as well as a full copy of your U.S. tax return for you to review and keep for your records.

However, should you wish to opt-out from having your U.S. tax return electronically filed, please initial as applicable in the following section:

Complete <u>only if you wish to opt-out</u> of having your U.S. tax return electronically filed.	Initial below if you wish to <u>opt-out</u> of having your U.S. tax return electronically filed.
By initialing here, you understand that you will be provided with a paper copy of your U.S. tax return that will need to be signed and mailed to the IRS and relevant state tax authorities as applicable.	