



U.S.-CDN Return Drop-off Questions

Completing the U.S./Canadian Return Drop-off Questions Sheet will help H&R Block match you with one of our 200+ dedicated U.S. Tax Professionals. If you're unsure how to answer any of the below, our U.S. Tax Professional will discuss with you in more detail during your interview.

Taxpayer information

Name: _____ Date of birth: _____

Address: _____

Phone number: _____ SSN: _____

U.S. Determination

Are you an American Citizen? Yes No

Do you hold a Green Card? Yes No

Were you on a U.S. Work Visa? Yes No

Visa number: _____ Dates valid from: _____ to: _____

Date entered the U.S.: _____ Date left the U.S.: _____

Have you filed a U.S. return before? Yes No Last year filed: _____

Do you have any RRSPs? Yes No

Do you have any Tax Free Savings Accounts? Yes No

Do you have any RESPs or Mutual Funds? Yes No

Do you have any non-US bank/investment accounts that at any point in the year had an aggregate total of at least \$10,000 (Even if the total may have only been achieved for one day) Yes No

Is your spouse a US citizen? Yes No ITIN# _____ Social Security# _____

Is your child a US citizen? Yes No ITIN# _____ Social Security# _____

Please provide the ITIN or Social Security number for each child. ITIN# _____ Social Security# _____

ITIN# _____ Social Security# _____

ITIN# _____ Social Security# _____

ITIN# _____ Social Security# _____



Canadian Determination

Are you working in Canada? Yes No

Canadian income since return to Canada: _____

Did you maintain a residence in Canada? Yes No

Did you maintain bank accounts in Canada? Yes No

Did you completely sever your ties with Canada? Yes No

Is this your first time filing a Canadian return? Yes No

Have you claimed worldwide income on your Canadian return? Yes No

Will we complete a Canadian return? Yes No If yes, what location? _____

Name of receiver

Year	Month	Day

Date received