

23. Are you qualified to vote in national & local general elections in Canada: [] Yes [] No
24. When completing various forms, documents, applications, etc., do you list Canada as your country of residence: [] Yes [] No
25. Have you ever completed any of the following U.S. forms or documents:
- | | |
|---|----------------|
| IRS Form W-8BEN (relating to foreign status) | [] Yes [] No |
| IRS Form W-9 (Request for Taxpayer I.D. Number) | [] Yes [] No |
| IRS Form 1078 (Certificate of Alien Claiming U.S. Residence): | [] Yes [] No |
| Did you complete any other U.S. forms: | [] Yes [] No |
| If you completed others, please explain _____ | |
26. Do you keep your personal, financial, and legal documents mainly in Canada: [] Yes [] No
27. Did you receive the majority of your income from Canada: [] Yes [] No
28. Did you have any income from U.S. sources, (including dividends from U.S. stocks): [] Yes [] No
- | | | |
|-----------------------------|-------------------------------|----------------|
| If yes, check which type(s) | Bank interest | [] Yes [] No |
| | Dividends from U.S. stocks | [] Yes [] No |
| | Pensions from the U.S. | [] Yes [] No |
| | Social Security from the U.S. | [] Yes [] No |
| | Real Estate Sale | [] Yes [] No |
| | Other - describe _____ | |
29. Were any investments you owned located mainly in Canada: [] Yes [] No
30. Did you qualify for a Provincial health plan in Canada: [] Yes [] No
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31. Are your credit cards mainly from Canadian issuers: [] Yes [] No
32. Excluding homeowner's insurance on your U.S. residence, were your insurance policies (or the policies of the spouse with whom you lived all year if they are in his/her name) purchased predominantly from Canadian carriers: [] Yes [] No
- 33a. Was your Will drafted in Canada: [] Yes [] No
- 33b. Does your Will indicate you are resident and/or domiciled in Canada: [] Yes [] No
- 33c. Do all the Executors in your Will reside in Canada: [] Yes [] No
34. Is it correct to state you have a cemetery plot available in Canada only: [] Yes [] No
35. Were you a resident of Canada for Canadian income tax purposes: [] Yes [] No
36. Did you file, (or will you file) a Canadian income tax return: [] Yes [] No
 If you answered "no", is it because your spouse filed (or will file) a Canadian income tax return and you do not have sufficient income in your own name to require a Canadian income tax return: [] Yes [] No
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- 37. Were you a lawful permanent resident of the United States under the U.S. immigration laws, (did you hold a "green card"), during the current year: [] Yes [] No
- 38. During the year did you apply for or take other affirmative steps to apply for, lawful permanent resident status in the United States or did you have an application pending to change your status to that of a lawful permanent resident of the U.S.: [] Yes [] No
- 39. Were you ever a U.S. citizen or U.S. resident: [] Yes [] No
If yes, please explain.
- 40. Did you sell U.S. real estate during the year: [] Yes [] No

Please check the address for mailing your "Closer Connection" filing to you, assuming it is mailed to you in the next 5 weeks:

Canadian address listed above, or U.S. address listed above

I acknowledge that The Brunton – McCarthy CPA Firm Chartered’s sole responsibility is to prepare my U.S. residency "Closer Connection Exception Statement" from the above information. I understand the deadline for filing the Statement for a calendar year taxpayer is June 15, (April 15 if there were wages subject to U.S. withholding) and I agree to immediately contact The Brunton – McCarthy CPA Firm if I have not received my Statement at least two weeks before the deadline.

Signature: _____ Date: _____
 Telephone numbers: U.S. _____ Canada _____
 Email: _____ Cell _____

PLEASE RETURN TO: THE BRUNTON – MCCARTHY CPA FIRM CHARTERED
 4710 NW 2ND AVENUE, #101, BOCA RATON, FL 33431
 Tel: (561) 241-9991 Fax: (561) 241-6332 Email: tax@taxintl.com Website: www.taxintl.com

Please include the US \$195 preparation fee with questionnaire.

If you wish, retainers can be paid on-line with a credit card. Please go to our website www.taxintl.com and scroll down to PayPal on the lower right hand side.