



2021 PERSONAL TAX PREPARATION U.S. TAX FILINGS: U.S. CITIZENS/U.S. RESIDENTS

Taxpayer's Name: _____
 Occupation: _____
 Citizenship: _____

Social Security Number: _____
 Date of birth: _____
mm/dd/yyyy

Spouse's Name: _____
 Occupation: _____
 Citizenship: _____

Social Security Number: _____
 Date of birth: _____
mm/dd/yyyy

Dependents' Names: _____
 Dependents' Citizenship: _____
 Dependents' Social Security Number: _____
 Dependents' date of birth: mm/dd/yyyy _____

If dependent(s) was over 19 in 2021, indicate whether they were full time students Yes No Yes No
****Note: If this is the first year GGFL is preparing your US return(s), please provide a copy of your 2020 US return(s).*

Foreign Reporting for US Returns:

Did you own direct or indirect interest in any of the following non-US entities (outside of your RRSP) during the year?

i. Non-US Private Corporation	Yes	No
ii. Non-US Partnership or Unlimited Liability Company	Yes	No
iii. Non-US Trust	Yes	No
iv. Non-US Mutual Fund or non-US exchange traded funds	Yes	No

Other questions applicable to your US Tax Filings:

a) Did you transfer or gift any property to another individual or trust during the year, or receive gifts or a distribution from a non-US estate, trust, partnership or corporation? Yes No

b) i) Did you own greater than 50% of the voting stock or value of a Canadian or non-US corporation during the year? Yes No
 ii) If not, did you own 10% or more of the voting stock or value of a Canadian or non-US corporation during the year ? Yes No

c) Did you have a Tax-Free Savings Account in 2021?
 If "Yes", please provide the income earned in the account for calendar year 2021. Yes No

d) Did you have a Registered Education Savings Account in 2021, where you are the owner?
 If "Yes", please provide quarterly RESP statements Yes No

e) Do you have a non-registered investment account?
 If "Yes", please provide us with a statement of your holdings as at December 31, 2021 from your broker. Yes No

f) Did you have a U.S. IRA, Roth IRA or 401(k) plan 2021?
 If "Yes", please provide us with a statement of your holdings as at December 31, 2021. Yes No

g) Did you have ownership or signing authority over any bank account, securities or other financial account (including RRSPs and RRIFs) located outside of the US at any time during 2021?
 If "Yes", please complete the attached FBAR Information Organizer. Yes No

h) Are you interested in receiving your US refund, if any, by direct deposit?

Yes

No

If Yes, do you have a US bank account?

Yes

No

i) Did you receive any Covid-19 Economic Impact Payments (EIP) in 2021?

Yes

No

If "Yes", please specify the amount received and date if available.

During the year, did you incur any of the following expenses?

Mortgage Interest (for a CDN or US home) \$ _____

Property Taxes (only for homes located in the US) \$ _____

Charitable Donations (CDN or US) \$ _____

Did you make U.S. estimated tax payments for the 2021 taxation year? If "Yes", please provide the payments made:

\$ _____
April 15, 2021

\$ _____
June 15, 2021

\$ _____
September 15, 2021

\$ _____
January 18, 2022