



25. Have you ever completed any of the following U.S. forms or documents:
- |   |                              |                             |
|---|------------------------------|-----------------------------|
| IRS Form W-8BEN (relating to foreign status)                  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| IRS Form W-9 (Request for Taxpayer I.D. Number)               | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| IRS Form 1078 (Certificate of Alien Claiming U.S. Residence): | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Did you complete any other U.S. forms:                        | <input type="checkbox"/> Yes | <input type="checkbox"/> 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 2007 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                 | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|                             | Dividends from U.S. stocks    | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|                             | Pensions from the U.S.        | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|                             | Social Security from the U.S. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|                             | Real Estate Sale              | <input type="checkbox"/> Yes | <input type="checkbox"/> 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 2007 for Canadian income tax purposes:  Yes  No
36. Did you file, (or will you file) a Canadian income tax return for 2007:  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 2007 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 2007 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, 2008, (April 16, 2008 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

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