|  |  |  |
| --- | --- | --- |
| **NAME □ Mr. □ Mrs.**  |  | **NAME - SPOUSE □ Mr. □ Mrs.**  |
| Name : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Surname : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  | Name : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Surname : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

 **Fill out the section below if you have arrived to Canada during the year**

|  |  |  |
| --- | --- | --- |
| Please answer following questions :  | You | Partner / Spouse |
| Arrival Date (DD/MM/YY) : | \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ | \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ |
| Status in Canada :  |  |  |
| Income earned from January 1st to your arrival date (specify currency)(you will not be taxed on the amount) : |  |  |
| Which country are you coming from?  |  |  |
| Are you still considered resident in country of origin? | **□ YES □ NO** | **□ YES □ NO** |
| Is your intent to establish yourself permanently in Canada? | **□ YES □ NO** | **□ YES □ NO** |
| If you are coming from the United States, do you have a Roth-IRA or Roth-401(k)? | **□ YES □ NO** | **□ YES □ NO** |

Note to persons having a SIN number beginning by « 9 »: the government often refuse a resident status even if the intention is to establish yourself definitely in Canada due to the temporary nature of SIN beginning by “9”. We prefer to warn you. Please discuss this with your advisor.

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Fill out the section below if you have departed from Canada during the year**

|  |  |  |
| --- | --- | --- |
| Please answer following questions :  | You | Partner / Spouse |
| Date of permanent Departure (DD/MM/YYYY):  | \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ | \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ |
| Country of residence after departure:  |  |  |
| Number of months of residence in Canada in the last 10 years prior to departure: | months | months |
| Foreign income from departure to 31st Dec. (specify currency) |  |  |
| Did you owned more than 25 000$ of worldwide assets\* at date of departure? \*Worldwide assets include all assets wherever they are in the world, including Canada and foreign countries. Worldwide assets includes life insurance policies, lands, real estate, stocks and investments in Canada or outside Canada.  | **□ YES □ NO** | **□ YES □ NO** |
| Did you have an outstanding balance of Home Buyer Plan or Life Learning Plan at departure?  | **□ YES □ NO** | **□ YES □ NO** |

You must fill out the table below if you have ceased to be a resident of Canada throughout the year and the fair market value of your worldwide assets exceeds **$ 25 000**  (With the exception of the following properties: cash, Registered Plans (RRSP, TFSA, trusts...), personal-use property (clothing, household goods, automobile...).

|  |  |  |  |
| --- | --- | --- | --- |
| Description of property (enter the address or location in the case of a building or land) | Number of shares (if any) | Canadian or foreign property | Fair market value at emigration date in CANADIAN DOLLARS |
|   |   |   |  $CAD |
|   |   |   |   $CAD |
|   |   |   |   $CAD |
|   |   |   |  $CAD |

*If you own real estate in Canada and are not a Canadian citizen nor permanent resident, please contact us to find out about your obligations regarding the Underused Housing Tax. In many cases, you must submit a return even if no tax is payable.*