

## QUESTIONS – TAX RESIDENCY TRANSITION

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The purpose of this form is to gather additional information related to your cross-border move, which has implications for tax filings on both sides of the border.

This form covers moves from Canada to the U.S. and vice versa. In our questions below, we will refer to your “prior home country” (PriorHC) and “new home country” (NewHC). If you moved from the U.S. to Canada, your prior home country would be the U.S. and your new home country would be Canada.

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### Housing in your PriorHC

As a result of your move to the NewHC, describe what happened to your housing in your PriorHC:

I/We owned a home there, and we sold it on this date: \_\_\_\_\_

I/We owned a home there, and we rented it. The lease began on this date: \_\_\_\_\_

I/We rented a home there, and the lease ended on this date: \_\_\_\_\_

I/We rented or owned a home there, and we still have that home available

I/We lived with family immediately before the move

If none of these options seem to fit your situation, describe what happened here:

### Housing in your NewHC

As a result of your move to the NewHC, describe your housing arrangements in NewHC:

I/We bought a home there, and the purchase closed on this date: \_\_\_\_\_

I/We rented a home on a long-term lease. The lease began on this date: \_\_\_\_\_

I/We stayed in temporary accommodations (e.g. AirBnb) for these dates: \_\_\_\_\_

I/We lived with family immediately after the move for these dates: \_\_\_\_\_

If none of these options seem to fit your situation, describe what happened here:

Provide the dates on which you were present in NewHC in the two calendar years before the move year:

If you received a U.S. green card or surrendered a U.S. green card in the move year, provide the date you received/surrendered the card: \_\_\_\_\_