

## FOREIGN PROPERTY QUESTIONNAIRE

The Canada Revenue Agency requires the filing of information forms for taxpayers who hold certain foreign property or have transactions with certain foreign entities. Foreign property includes foreign holdings in a Canadian non-registered investment account. Investments held in your RRSP, RRIF, TFSA, and/or through Canadian mutual funds should **not** be included.

***\*There are significant financial penalties for not filing these forms if they are applicable.***

Please answer the questions below **for each taxpayer** and **return this sheet** with your other tax information. You could also complete the online version of this form on this link: <https://sterncohenllp.formstack.com/forms/fpq>

Name: \_\_\_\_\_

Date: \_\_\_\_\_

QUESTIONS	YES	NO
1. Did you hold foreign property with a total <b>cost</b> amount of more than \$100,000 CAD at any time during 2023? If yes, indicate below the type of property held. This includes:	<input type="checkbox"/>	<input type="checkbox"/>
a) Funds held outside Canada;	<input type="checkbox"/>	<input type="checkbox"/>
b) Shares of non-resident corporations other than foreign affiliates;	<input type="checkbox"/>	<input type="checkbox"/>
c) Indebtedness owed by non-residents;	<input type="checkbox"/>	<input type="checkbox"/>
d) Interest in non-resident trusts;	<input type="checkbox"/>	<input type="checkbox"/>
e) Real property outside Canada (excluding personal use property);	<input type="checkbox"/>	<input type="checkbox"/>
f) Other property outside Canada.	<input type="checkbox"/>	<input type="checkbox"/>
2. Have you <b>ever</b> at any time before 2023 transferred or loaned property to i) a foreign trust, or ii) a foreign company in which a foreign trust and/or Canadian resident had a significant interest?	<input type="checkbox"/>	<input type="checkbox"/>
3. Have you at any time during 2023 owned 1% or more of the issued shares of any class of a foreign corporation?	<input type="checkbox"/>	<input type="checkbox"/>
4. Have you at any time during 2023 received property of any sort from a foreign trust and/or been indebted to such a trust?	<input type="checkbox"/>	<input type="checkbox"/>