

## Sunstone US Tax Forms Information Request 2015

1. Investor type:
  - a. Individual
  - b. Corporation
  - c. Trust or Estate
  - d. Partnership
  - e. Other, please specify
  
2. Legal name of the Investor:
  - a. Individual: First Name, Middle Name, Last Name
  - b. Corporation: Legal name of the corporation (legal name of contact person)
  - c. Trust / Estate: Legal name of trust / estate (legal name of the executor, administrator, trustee, “care of” person)
  
3. Mailing address (If you are providing a P.O. Box, please also include your street address), City/Town, Province/State, Postal Code/Zip Code, Country
  
4. US Tax ID:
  - a. Individuals: U.S. social security number (SSN) or U.S. Individual taxpayer identification number (ITIN).
  - b. Non-individuals: U.S. Employer identification number (EIN)
  
5. Brokerage firm name through which you hold your interest in Sunstone US Opportunity (No. 2) Realty Trust and/or Sunstone US Opportunity (No.3) Realty Trust (collectively known as “Sunstone”)
  
6. Brokerage account number(s) of the brokerage firm identified that holds that investment in Sunstone
  
7. For **each** account number identified, please provide the number of units (**and name of the Sunstone Fund**) held through the account number as at **October 1, 2015**
  - a. If units are held jointly by spouses, allocate the total number of units between the spouses based on how income from these units were previously divided and reported by each spouse for income tax purposes. Each spouse that is allocated units must submit and complete a separate Sunstone US Tax Forms Information Request to obtain his/her US tax forms.
  
8. Please confirm if the investor meets all of the following:
  - a. Is not currently and never was a US citizen;
  - b. Was not born in the US and never obtained a US Social Security Number or a US passport;
  - c. Is not currently a Green Card holder and never was a Green Card holder

9. Please specify if you would like to have your US Tax Forms to be delivered through an email or mail in paper form. Note that mailing the paper form will take longer.
  - a. Email: please provide a valid email address.
  - b. Mail: please provide a mailing address.
  
10. Please provide your phone number if we need to contact you.