

1040NR TAX RETURN ORGANIZER (OTHER INCOME)
FOR INTERNAL USE ONLY

FOR CALENDAR YEAR _____ CURRENT DATE _____
(Each spouse must complete a separate organizer)

TO AVOID DELAY WITH YOUR RETURN PLEASE ANSWER ALL QUESTIONS AND PROVIDE COPIES OF NECESSARY DOCUMENTATION

1. Name _____ Phones: Home (US): _____ Home (Non-US): _____
2. Address _____ Cell: _____ Office: _____
_____ Fax: _____ Email: _____
3. U.S. taxpayer identification number, if any. Please do not give a non-U.S., (e.g. Canadian or UK) number _____
4. Birth date _____ [] Single [] Married/ Common Law [] Separated -by Court decree) [] Separated- not by Court decree
5. Dependent Children: Name _____ Date of Birth _____ Did each live with you all year? [] Yes [] No
Children's U.S. taxpayer identification number, if any. (Please do not give a non-U.S. e.g. Canadian number) _____
6. Country of Citizenship _____ Citizenship of Spouse _____ Country of Birth _____
7. Country issuing your Passport _____ Country of Residence for income tax _____ - _____
8. Were you ever a U.S. citizen? [] Yes [] No. Was one of your parents ever a U.S. citizen? [] Yes [] No
9. Did you have a "green card" during the year? [] Yes [] No If yes, date you acquired green card _____
If no, have you applied for a green card? [] Yes [] No [] N/A If yes, when did you apply for a green card? _____
Have you abandoned a green card, or relinquished US citizenship since 1995? [] Yes [] No If yes, indicate date _____
On the last day of the tax year did you have any other U.S. visa? [] Yes [] No If "Yes", Type of Visa (e.g. B-1, E-2, H1B) _____
Have you ever changed your U.S. visa type? [] Yes [] No If yes, please provide details.
10. Did you ever have a "green card"? [] Yes [] No If yes, when did you obtain it and when did you give it up? _____
11. Were you ever a U.S. resident? [] Yes [] No
12. Did you abandon your permanent residence as an immigrant to the U.S. during the year? [] Yes [] No
13. Purpose of your visit to the U.S. _____
14. Dates you entered and left the U.S. during the above calendar year (i.e. the year for which your return is being prepared) _____
15. Please provide and compute the following: Column A

Number of days you were in the U.S. in the above <u>calendar</u> year (i.e. the year for which your return is being prepared):	_____
Number of days you were in the U.S. in the preceding <u>calendar</u> year: Compute 1/3 of the days in the preceding year & place in Column A:	_____
Number of days you were in the U.S. in the 2nd preceding <u>calendar</u> year: Compute 1/6 of days in the 2nd preceding year & place in Column A:	_____
Add the total days in Column A	_____

If the total of Column A is 183 days or more please complete the enclosed "closer connection" questionnaire. Please return the completed "closer connection" questionnaire to us with this form. In this case there is an important deadline for your U.S. tax return. Please act promptly.

Please complete reverse side also



16. Have you ever filed a U.S. income tax return? Yes No
 If Yes, give: Year(s) _____ Form Number _____ Where sent _____
17. Did your spouse contribute to the support of any dependents? Yes No

U.S. INCOME EARNED

18. Did you ever work in the United States? Yes No
 If yes, did you have any stock options at that time? Yes No
19. Did you receive salary income from the United States during the year? Yes No
 If yes, please attach a statement describing the payor, amount earned, related expenses, nature of employment, and number of days worked in the U.S. Please also provide the U.S. wage withholding Form W-2.
20. Did you receive business income from the United States during the year? Yes No
 If yes, please attach a statement describing the nature of the business, the income and expenses for the year, assets purchased and information about U.S. office premises and U.S. agents or other individuals that could be construed as a US permanent establishment. Please also provide any and all U.S. income reporting forms.
21. During the calendar year did you pay expenses aggregating US \$600 or more to any individual or attorney? If yes, please provide details Yes No
22. Did you receive any rental income from U.S. real estate during the year? Yes No If yes, please contact our office.
23. Did you sell U.S. real estate during the year? Yes No If yes, please contact our office.
24. Did you receive any other income from U.S. sources during the year? Yes No
 If yes, please describe, including payor and amount _____
25. During the year did you receive any gifts or bequests from individuals that previously were US citizens or green card holders? Yes No If yes, please contact our office.
26. Did your spouse (if applicable) receive any U.S. income? Yes No
27. Will your spouse (if applicable) be filing a U.S. income tax return? Yes No
 If "No" does your spouse have a US taxpayer identification number? Yes No

OTHER

28. Provide details and amounts of any taxes withheld or paid including date paid in the U.S. during the year. Also provide details of charitable contributions, casualty or theft losses in the U.S. and any business expenses.
29. **Have you answered all questions & supplied all documents requested on this questionnaire? Yes No**
If "No" please explain, otherwise your tax return may be delayed and/or the fee may be increased because of the extra time required.

Signed: _____
