

EXPATTAX, LLC
Tax Organizer

PERSONAL INFORMATION	<u>Taxpayer</u>	<u>Spouse</u>
Name (First, Middle, Last)		
Occupation		
Social Security Number		
Birthdate		
Email		
Physical Address		
Mailing Address		
Home Telephone		
Work Telephone		
Mobile Telephone		
Marital Status	Single Married Widowed	Marriage Date Divorce Date
DEPENDENTS	<u>First Dependent</u>	<u>Second Dependent</u>
Name		
Relationship		
Birthdate		
Social Security Number		
Income Amount		
F-T Student	Yes No	Yes No
Months in your home		
% Support Received		
INCOME	<i>Please submit government statements reflecting worldwide income</i>	
	Rental income - attach income / expense figures with cost basis / in-service date for depreciation	
DEDUCTIONS	<i>Provide expense info for education, employee, moving, medical, mortgage interest, property tax, etc.</i>	
FOREIGN INFORMATION	<u>Taxpayer</u>	<u>Spouse</u>
Employer Name		
Employer foreign address		
Employer U.S. address		
<u>Spouse</u> Employer Name		
<u>Spouse</u> Empl. Foreign Add.		
<u>Spouse</u> Empl. U.S. Address		
Citizenship		
Foreign Residence Date		
Housing Type	Rent Own Employer-Furnished	Other

Employment Contract Term		
Visa Type		
Visa Expiration		
Covered by SoFA or TESA	Yes No	Yes No
U.S. Home Address		
If yes, rented?	Yes No	
Occupant Relationship & Name		
Foreign Taxes Paid	<i>Submit government statement reflecting foreign taxes paid</i>	
Name of Country		
Travel Calendar	<i>Submit travel reflecting U.S. travel. If arrival / departure yr., include all travel. Note U.S. Workdays</i>	
Foreign Housing	Amount of rent	
	Amount for utilities	

