

1040-NR TAX RETURN ORGANIZER (INDIVIDUAL)

FOR TAX RETURN YEAR ENDED _____

(Each spouse completes a separate organizer)

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

1. Name _____ Phones: Home (U.S.): _____ Home (Non-U.S.): _____
2. Address _____ Cell: _____ Office: _____
 _____ Fax: _____ Email: _____
3. U.S. Taxpayer Identification Number, if any. (Please do not give a non-U.S. e.g. foreign number) _____
- 3a. If you have a U.S. Taxpayer Identification Number, did you receive an ITIN renewal notice from the IRS? Yes ___ No ___ N/A ___
 If "Yes", please email us a copy and contact our office. What year did you obtain your ITIN? _____
4. Birth date _____ Marital Status: Single Married / Common Law Separated (by Court decree) Separated (not by decree)
5. Country issuing your passport _____ Country of residence for income tax _____
6. Country of birth _____ Country of citizenship _____
7. Were you ever a U.S. citizen or U.S. resident? Yes ___ No ___ Was one of your parents ever a U.S. citizen? Yes ___ No ___
8. Have you ever had a "green card"? Yes ___ No ___ If "Yes", date you acquired green card _____
 If "No", have you applied for a green card? Yes ___ No ___ NA ___ If "Yes", when did you apply for a green card? _____
 Did you give up a green card during the year? Yes ___ No ___ If "Yes", when did you give up the green card? _____
 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, H-1B) _____
 Have you ever changed your U.S. immigration visa type? Yes ___ No ___ . If "Yes", please provide details to your tax preparer.
9. Spouse's name _____ Spouse's birth date _____ Will your spouse be filing a U.S. income tax return? Yes ___ No ___
 Spouse's U.S. Taxpayer Identification Number, if any. (Please do not give a non-U.S. e.g. foreign number) _____
 Citizenship of spouse _____ Residency of spouse _____
10. Dependent Child 1: Name _____ Date of birth _____ Did child 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.. foreign number) _____
 Dependent Child 2: Name _____ Date of birth _____ Did child 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.. foreign number) _____
 Dependent Child 3: Name _____ Date of birth _____ Did child 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.. foreign number) _____
11. Purpose of your visit to the U.S. _____.

12. (QUESTION 12. NOT APPLICABLE TO CANADIAN AND MEXICAN RESIDENTS) Enter here the **exact** dates you entered and left the U.S. during the calendar year (i.e. the year for which your return is being prepared).

13. Please also provide and compute the following:
 - a) Number of days you were in the U.S. in the calendar year for which your return is being prepared: _____
 - b) Number of days you were in the U.S. in the preceding calendar year: _____
 - c) Number of days you were in the U.S. in the 2nd preceding calendar year: _____

Add the total days from (a. b. c.) here: _____

Banking / Financial Information

14. Do you want your refund directly deposited in your U.S. bank account? Yes ___ No ___
 If "Yes", please provide the following information:

Type of account: Checking: _____ or Savings: _____	Name of your bank /credit union / financial institute: _____
Bank routing number: _____	Name(s) on account (if other than yours): _____
Bank account number: _____	_____
_____	_____

U.S. INCOME EARNED

15. Have you ever filed a U.S. income tax return? Yes ___ No ___
If "Yes", please provide a copy of the most recent U.S. return (unless prepared by us):
Year(s) Filed: _____ Form Number: _____
16. Did you work, or conduct any business, in the U.S. during the year? Yes ___ No ___
17. Did you receive salary income from the U.S. during the year? Yes ___ No ___
If "Yes", please attach a statement describing the payor, amount earned, related expenses, nature of employment, number of days worked in the U.S., and states worked in during the current tax year.
Please also provide the U.S. wage withholding Form W-2.
18. If you received business income from the U.S. during the year, 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 U.S. permanent establishment. Please also provide any and all U.S. income reporting forms.
19. Did you ever work in the U.S.? Yes ___ No ___
If "Yes", did you have any stock options at that time? Yes ___ No ___
20. Did you receive any other income from U.S. sources during the year? Yes ___ No ___
If "Yes", please describe, including pay and / or amount. _____.
21. Did you receive any rental income from U.S. real estate during the year? Yes ___ No ___
If "Yes", please provide your tax preparer with a property expense report / income statement or profit and loss.
You can download and use our profit and loss template here: <https://taxservicemasters.com/profit-and-loss/>
22. Did you ever make an election to tax rental income as effectively connected with a U.S. business? Yes ___ No ___
23. Did you sell U.S. real estate during the year? Yes ___ No ___
If "Yes", please provide your tax preparer with a supporting document (Closing Statement / Settlement Statement).
24. Do you currently have U.S. property listed for sale or do you currently intend to list property for sale? Yes ___ No ___
25. Did you engage in any transaction involving virtual currency? Yes ___ No ___
- OTHER**
26. During the calendar year did you pay U.S. expenses aggregating US \$600 or more to any individual, unincorporated business, or attorney? Yes ___ No ___
If "Yes", please provide details on a separate sheet of paper.
If "Yes", did you file Form 1099-MISC to report to the IRS the above U.S. expenses? Yes ___ No ___ NA ___
27. During the year did you receive any gifts or bequests from individuals that previously were U.S. citizens or green card holders? Yes ___ No ___
If "Yes", please provide a brief description of the gift(s) and the estimated worth or amount(s) you received:

28. If Applicable, provide details and amounts of any taxes withheld or paid in the U.S. during the year. Also provide details of:
Charitable Contributions: _____ Amount Total: _____
Casualty or Theft Losses in the U.S.: _____ Amount Total: _____
Business Expenses: _____ Amount Total: _____

Taxpayer Full Name: _____

Taxpayer Signature: _____

Date: _____

We offer convenient payment options, please choose the payment method you prefer.

- Invoice to Email – Credit / Debit Card Online via Invoice (Most Popular).
- Credit Card Checkout via the Tax Service Masters Pricing Page.
- Zelle # 727-241-9760.
- Phone In Payment: 727-610-1024.
- Walk-In / Office Payment: 1903 N Hercules Ave, Clearwater, FL 33763.
- I Already Paid / Prepaid.

IF YOU SUBMITTED THIS FORM ONLINE: NO FURTHER ACTION IS REQUIRED, YOU SHOULD AUTOMATICALLY RECEIVE A COPY OF YOUR SUBMISSION TO THE EMAIL YOU PROVIDED.

IF YOU ARE DOWNLOADING, AND FILLING OUT DOCUMENT RETURN COMPLETED TO:
TaxServiceMasters.com/upload/ **or** taxservicemasters@gmail.com

If you are experiencing any issues with the form or have questions we can be reached at via call or text message to: **727-241-9760** or **727-610-1024**

Additionally, you can book an appointment Online via Google Calendar [here](#).