

1040NR TAX RETURN ORGANIZER (OTHER INCOME)
FOR INTERNAL USE ONLY BY THE BRUNTON – MCCARTHY CPA FIRM CHARTERED

FOR CALENDAR YEAR _____ CURRENT DATE _____

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 _____ Martial Status: Single Married Widow(er) with Dependent Child
 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 _____ Country of Birth _____
 7. 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 February 2, 1995? Yes No
Do you have any other U.S. visa? Yes No If "Yes", Type of Visa _____ Visa number, if any _____
 8. Country issuing your Passport _____ Country of Residence _____
 9. 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
 10. Purpose of your visit to the U.S. _____
 11. Did you abandon your permanent residence as an immigrant to the U.S. during the year? Yes No
 12. Dates you entered and left the U.S. during the above calendar year _____
 13. 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.
14. Have you ever filed a U.S. income tax return? Yes No
If Yes, give: Year(s) _____ Form Number _____ Where sent _____
 15. Did your spouse contribute to the support of any dependents? Yes No

U.S. INCOME EARNED

16. 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.
17. 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.
18. Did you receive any rental income from U.S. real estate? Yes No If yes, please contact our office.
19. Did you sell U.S. real estate during the year? Yes No If yes, please contact our office.
20. Did you receive any other income from U.S. sources? Yes No
If yes, please describe, including payor and amount _____
21. Did your spouse (if applicable) receive any U.S. income? Yes No
22. Will your spouse (if applicable) be filing a U.S. income tax return? Yes No

OTHER

23. 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.
24. 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: _____

PLEASE RETURN TO: THE BRUNTON – MCCARTHY CPA FIRM CHARTERED 4710 NW 2ND AVENUE, #101, BOCA RATON, FL 33431
Tel: (561) 241-9991 Fax: (561) 241-6332 Email: tax@taxintl.com

Please include a US \$300 retainer with this organizer.