1040-NR TAX RETURN ORGANIZER (FOREIGN ESTATE)

(FOR INTERNAL USE ONLY BY THE BRUNTON, STRACHAN & KHAN CPA FIRM, CHARTERED)

FOR TAX RETURN YEAR ENDED_____ CURRENT DATE _____

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

1. Name of decedent _____ Date of death _____

2. U.S Taxpayer Identification Number (Employer Identification Number), if any _____

3. Citizenship of decedent _____ Country of residence of the decedent _____

4. Decedent's domicile at the time of death _____

5. Name of the executor and/or personal representative of the estate _____

   Address _____

   Phones: Home _____Office _____ Cell_____ Email: _____

6. Name and address of any additional individual to whom tax return is to be sent _____

   _____

7. Nature of the Unites States activities of the estate _____

8. Has the estate ever filed a U.S. tax return? Yes / No_____
   Please attach a copy unless it was prepared by us.

9. Did the estate receive any rental income from U.S. real estate? Yes / No_____
   If "Yes", please complete the separate organizer "U.S. Real Estate Organizer".

10. Did the estate sell U.S. real estate during the year? Yes / No_____
    If "Yes", please complete the separate organizer "U.S. Real Estate Organizer".

11. Did the estate receive any other income from U.S. sources? Yes / No_____
    If "Yes", please describe, including payor and amount_____

12. During the year did the estate make any distributions to U.S. citizens, green card holders, or other U.S. residents? Yes / No_____

13. During the calendar year did the estate pay U.S. expenses aggregating US $600 or more to any individual, unincorporated business, or attorney? Yes / No_____
    If "Yes", please provide details _____
    If "Yes", did the estate file Form 1099-MISC for the above U.S. expenses? Yes / No_____

14. Did the estate pay or have withheld any U.S. federal or state income tax? Yes / No_____
    If "Yes", give details including payment dates and amounts _____

15. **Have you answered all questions & supplied all documents requested on this questionnaire?** Yes / No_____
    If "No", please explain, otherwise the tax return may be delayed and/or the fee may be increased because of the extra time required. _____

Signed: _____

PLEASE RETURN TO: THE BRUNTON, STRACHAN & KHAN CPA FIRM, CHARTERED
4710 NW BOCA RATON BLVD., #101, BOCA RATON, FL 33431
Tel: (561) 241-9991 Fax: (561) 241-6332 Email: tax@taxintl.com Website: www.taxintl.com

Please include a US $1,000 retainer payable to "The Brunton, Strachan & Khan CPA Firm" with this organizer.

If you wish, retainers can be paid online with a credit card. Please go to our website www.taxintl.com and scroll down to "Make Payment" on the lower right side or call our office to make a credit card payment over the phone.