

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

PART I – GENERAL INFORMATION

- 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 _____

PART II – U.S. INCOME

- 7. Nature of the United 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 _____

PART III – OTHER

- 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 and/or 1099-NEC 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.cpa Website: www.taxintl.cpa

Please include a US \$1,500 retainer payable to “The Brunton, Strachan & Khan CPA Firm” with this organizer.
 If you wish, retainers can be paid online with a credit card or eCheck. Please go to our website, www.taxintl.cpa and scroll down to “Make Payment” on the lower right side, or call our office to make a credit card payment over the phone.