

(FOR INTERNAL USE ONLY BY ABITOS, CPAs AND ADVISORS,
FORMERLY KNOWN AS THE BRUNTON STRACHAN & KHAN CPA FIRM)

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 _____

PART I – 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".
If the estate received the stamped IRS Form 8288-A (Copy B) from the IRS, please provide it to us. Attached / No _____
11. Did the estate receive any other income from U.S. sources? Yes / No _____
If "Yes", please describe, including payor and amount _____

PART II – 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: ABITOS, CPAs AND ADVISORS, FORMERLY
KNOWN AS THE BRUNTON, STRACHAN & KHAN CPA FIRM
327 PLAZA REAL, STE 235, BOCA RATON, FL 33432
Tel: (561) 241-9991 Fax: (561) 241-6332 Email: tax@taxintl.cpa Website: www.taxintl.cpa

Please include a US \$1,750 retainer payable to "AbitOs, PLLC" 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.