

1040-NR TAX RETURN ORGANIZER (FOREIGN ESTATE)

(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

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 \_\_\_\_\_ E-Mail: \_\_\_\_\_
Address \_\_\_\_\_
Phones: (U.S.): \_\_\_\_\_ (Non-U.S.): \_\_\_\_\_ Cell: \_\_\_\_\_ Office: \_\_\_\_\_
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 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”.
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 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 \_\_\_\_\_

If you have not answered all questions & supplied all documents requested on this organizer, please explain, otherwise your tax return may be delayed and/or the fee may be increased due to the extra time required.

Signed: \_\_\_\_\_

PLEASE RETURN TO:
ABITOS, CPAs AND ADVISORS
327 PLAZA REAL, STE 235, BOCA RATON, FL 33432
Tel: (561) 241-9991 Fax: (561) 826-9299 E-Mail: bsk@abitos.com Website: www.abitos.com