

Resident / Non-Resident Tax Organizer

COMPLETE QUESTIONNAIRE BELOW. PROVIDE YOUR FORM W-2s, 1042-S, 1098E, 1098T, 1099s, 1095s & ANY OTHER TAX DOCUMENTS YOU HAVE RECEIVED ALONG WITH A COPY OF YOUR 2015 FEDERAL AND STATE TAX RETURNS (IF YOU FILED).

Date Received: _____

Personal Information

First name	
Middle name	
Last name	
Home address	
Home address (continued)	
Foreign address	
Foreign address (continued)	
Telephone number (Cell)	
Email address	
Date of Birth (MM/DD/YYYY)	
Social Security Number	
Passport number	
Driver's license/state ID number	
Occupation	
Number of day in US in 2016	
Country of Citizenship (during 2016)	
Country you claim residence (during 2016)	
Have you applied for a green card in the US Where you ever a US Citizen or Green Card holder	Yes <input type="checkbox"/> or No <input type="checkbox"/>
VISA type on 31-DEC-16	Yes <input type="checkbox"/> or No <input type="checkbox"/>
US immigration status on 31-DEC-16	
Have you ever changed your visa type (nonimmigrant status) or US immigration status	Yes <input type="checkbox"/> or No <input type="checkbox"/>
If you answered "yes", indicate the date and nature of the change	

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Spouse & Dependent Information

Spouse first name	
Spouse last name	
Citizenship	
VISA Type	
Date of Birth (MM/DD/YYYY)	
Social Security Number (or ITIN)	
Passport number	
Driver's license/state ID number	
Occupation	
Number of days lived with you in US in 2016	
Dependent (1) first name	
Dependent last name	
Citizenship	
VISA Type	
Date of Birth (MM/DD/YYYY)	
Social Security Number (or ITIN)	
Passport number	
Number of days lived with you in US in 2016	
Dependent (2) first name	
Dependent last name	
Citizenship	
VISA Type	
Date of Birth (MM/DD/YYYY)	
Social Security Number (or ITIN)	
Passport number	
Number of days lived with you in US in 2016	
Dependent (3) first name	
Dependent last name	
Citizenship	
VISA Type	
Date of Birth (MM/DD/YYYY)	
Social Security Number (or ITIN)	
Passport number	
Number of days lived with you in US in 2016	

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Banking Information

Estimated taxes paid for 2016 (if any)	
Tax refund direct deposit account	Checking <input type="checkbox"/> or Savings <input type="checkbox"/>
Name of bank	
Routing number	
Account number	

IF RESIDENT FOR TAX PURPOSES: Did you have financial interest in or signature authority over a financial account in a foreign country in 2016? YES NO

Value of all accounts (if over \$10,000)	
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Dates Entered & Departed US

List all dates you entered and left the US during 2016 (clearly mark "date entered" and "date left.") – Use separate sheet of paper if necessary:	
Give number of days (including vacation, non-workdays, and partial days) you were present in the United States during:	2014 _____ 2015 _____ 2016 _____