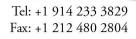


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This tax organizer, supplemental to our Individual Income Tax Organizer, has been designed to assist US citizens or permanent residents (Green Card holders) living abroad in compiling the information needed to prepare their US Income Tax return. The following pages contain questions that determine the proper handling of common income items, expenses, deductions and credits.

The Internal Revenue Service matches information returns and information exchanged with other national authorities with amounts reported on tax returns. A negligence penalty may be assessed if income is underreported or deductions are overstated. Accordingly, all information returns reflecting amounts reported to the Internal Revenue Service should be submitted with this organizer.

Our experience suggests that overseas filers often do not receive the full benefits of the Tax Code. At Pacific Tax Partners, you can be assured that we are current with the latest developments and we will give you the personal attention you deserve.

In order to deliver quality services on a timely basis, we urge you to collect your information as soon as possible.

We work hard to make the tax process as painless as possible.

Please confirm your filing deadline with us (deadlines may vary!). Your completed tax organizer and all supported information need to be received at least 5 business days ahead of your deadline. Any information received after that date may require that an extension (or further extension) of time be filed for your tax return. Keep in mind, that if an extension of time is required, any tax due must be paid with the initial extension. Any taxes not paid by the filing deadline may be subject to late payment penalties and interest.

We look forward to providing excellent services to you. In addition to preparing your tax returns, we also provide tax planning and wealth advisory services that may benefit you. Should you have any questions, please do not hesitate to contact us. Put our expertise to work for you!

Terry Wilson, CPA/PFS Tax Practice Lead





Taxpayer's full name:
Taxpayer's Social Security Number:
Foreign address (in English):
Foreign address (in local language):
Mailing address to use for your tax return, if different:

Please answer the following questions and submit details for any question answered "Yes":

		<u>YES:</u>	<u>NO:</u>
1.	Are you a US citizen? If not, what country are you a citizen of?		
2.	Are you a Green Card holder?		
3.	Is your spouse a US citizen? If not, what country is your spouse a citizen of?		
4.	Is your spouse a Green Card holder?		
5.	Did you and/or your spouse file a foreign tax return?		
6.	Are you required to file a US State Tax Return (such as California or Hawaii)?		
7.	Do you want to file a US State Tax Return? If yes, please let us know your reason:		



8. When	did you arrive	in the foreign count	ry?	/	/	(MM/DD/YYYY)
						()

If you were a mid-year arrival in your new foreign country, we will need a record of your trips to the US for one year prior to your arrival date in #11 below.

9. Are you still a resident of the foreign country?	Yes 🗖 No 🗖
10. If no, did you return to the US to take up residency?	Yes 🛛 No 🖵
If not, what foreign country did you move to and when?	
If yes, in which state did you take up residency?	

11. If you were present in the US or its possessions (such as Guam, Saipan or Puerto Rico) during the calendar year, please fill in the following information for each trip to the US. If there was a business purpose for any of those trips, please indicate the number of days on business^{*}:

Date arrived in the US	Date departed the US	Days in US on business

Use additional sheets if necessary. Please attach any related earning statements for these travels.

* For instance, if you were a UK resident actor who traveled to Hollywood to make a movie, you would receive US-source income.

12. Have you ever filed a Form 2555 (or 2555EZ)?	Yes 🛛 No 🗖
If so, what was the last year you filed this Form?	
13. Have you ever claimed a Foreign Earned Income Exclusion?	Yes 🗆 No 🗆
14. Do you have to pay income taxes in foreign country?	Yes 🗆 No 🗆
15. Under what visa type did you enter the foreign country and does it limit the	he length of your stay?



t kind of residence do you have in foreign country?	
Purchased house	
Rented house or apartment	
Rented room	
☐ Residence provided by employer	
s your employer pay residence and/or living expenses?	Yes 🗌 No 🗌
w much did you (or your employer) pay for rent and utilities (excl	luding phone and cable TV)?
e there commission or agent fees, or contract premium and key ch? Yes I No I Amount	
	Yes 🗆 No 🗖
f yes, was it occupied or rented?	Yes □ No □ Yes □ No □
Do any members of your family live in your U.S. residence?	Yes D No D
	□ Purchased house □ Rented house or apartment □ Rented room □ Residence provided by employer s your employer pay residence and/or living expenses? r much did you (or your employer) pay for rent and utilities (excl e there commission or agent fees, or contract premium and key ch? Yes □ No □ Amount s any of your family live with you? f so, what are their names and relationships to you? you maintain a home in the U.S. while living abroad? f yes, was it occupied or rented? Please, provide the address of your US residence:



21. If you and/or your spouse worked during your foreign residency, please provide the following employment information:

For taxpayer:		
Employer's name:		
Employer's addres	s in foreign country:	
Employer's address	s in US, if any:	
Is employer a:	\Box Foreign entity \Box US company	□ Self
	□ Foreign affiliate of a US company	□ Other:
For spouse:		
Employer's name:		
	s in foreign country:	
Employer's address	s in US, if any:	
Is employer a:	\Box Foreign entity \Box US company	□ Self
	□ Foreign affiliate of a US company	□ Other:
• •	your spouse self-employed in the US and/or for ovide you with an additional self-employed/sm	
23. Did you and/o	or your spouse work in the US as a US resident	t? Yes 🗆 No 🗖
If yes, please atta	ched related earning statements (W-2 or 1099)	or provide details:
24. Did you have	any foreign-sourced income from: foreign ba	nk accounts, mutual funds, bonds, stock

etc.; lottery winnings or gambling income; gifts; real estate; royalties or rental income; other sources?

Yes 🛛 No 🗆



If yes, please let us know the details so we can ensure proper credit for the foreign taxes you may have already paid.

25. If you had a financial interest in or signature authority or other authority over any financial account in a foreign country, and if the aggregate value of these accounts exceeded \$10,000 at any time during the calendar year, please provide the following information:

Names and full addresses of the financial institutions where you have your foreign accounts Types of these accounts (bank, securities or other) and their account numbers Highest balance in each account during the calendar year

Warning: please be advised that the minimum penalty for failing to provide this information to the US Treasury Department is \$10,000 for each year. In addition to civil fines, felony criminal penalties may apply. Please take this seriously and consult us if you have any questions.

26. Are you covered by a foreign pension plan (not US qualified)	Yes 🗆 No 🗆
If so, did you make any contributions or receive benefits in 2010?	Yes 🗆 No 🗆

27. Would you like to benefit by receiving information on the financial planning services offered by Pacific Tax Partners? Yes □ No □