

BARRON'S INTERNATIONAL TAX SERVICE
U.S. International Taxation & Accounting
www.taxbarron.com

For us to assist in preparing your Form 5471 – Information Return for Foreign Corporations – we require copies of the foreign corporation's calendar or year-ending Trial Balance, Balance Sheet, Income Statement, Depreciation or Fixed Assets Schedule, and copy of Form 5471 if previously filed. Copy of any U.S. tax return filed may also be required. Please answer the following questions (Use last page for additional notes):

U.S. PERSON FILING THIS FORM (U.S. citizen or resident, domestic corporation, domestic partnership, domestic estate or trust):

Name: _____
Social Security or Federal Identification Number: _____
Address: _____

Filer's Tax Year: _____
Filer Is Shareholder: _____, **Director:** _____, **Officer:** _____

Percentage of Voting Stock Owned Directly or Indirectly: _____
Number of Shares Owned Directly: _____ **Indirectly:** _____
Describe Indirect Ownership: _____

Example 1: Indirect ownership of a foreign corporation is an individual who owns 10% or more of a U.S. company that in turn owns 100% of a foreign subsidiary.

Example 2: Stock owned by a spouse, children, grandchildren or parents shall be attributed to individual filer, or owned by a partnership, corporation, trust or estate in which individual has ownership or beneficial interest.

Note: Form 5471 filing requirements vary depending on whether U.S. person acquires or disposes of 10% interest in foreign corporation or controls the foreign corporation directly or indirectly (<50%).

FOREIGN CORPORATION NAME AND ADDRESS:

DATE OF FORMATION: _____
PRINCIPAL PLACE OF BUSINESS: _____
BUSINESS OF CORPORATION: _____

DESCRIPTION OF STOCK: _____
NUMBER OF SHARES ISSUED
Beginning of Tax Year: _____
End of Tax Year: _____

FOREIGN FINANCIAL ACCOUNT: Did U.S. person filing this return have any interest in or signature over one or more foreign financial accounts during the accounting period? (Yes/No): _____ If Yes, did the aggregate amount exceed \$10,000 at any time during the period? _____

DOES THE FOREIGN CORPORATION HAVE ANY INTEREST IN ANOTHER CORPORATION? _____ **If Yes, what was the % of Shares:** _____

SALARIES PAID TO OFFICERS/DIRECTORS/SHAREHOLDERS:

NAME	AMOUNT
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

DESCRIBE ANY U.S. SOURCE BUSINESS INCOME AND AMOUNTS:

NOTE: IRS has announced that starting 1 January 2009, an automatic \$10,000 penalty may be assessed for inaccurate Form 5471s. So be diligent in filing out this organizer!

ADDITIONAL INFORMATION

