

## Tax Organizer

The TaxBarron

**BARRON'S INTERNATIONAL TAX SERVICES**

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NOTE: New clients should fill in spaces in top half of page; otherwise, returning clients complete applicable spaces

<b>YOUR NAME:</b>	<b>SOC. SEC. NUMBER:</b>
<b>DATE OF BIRTH:</b>	<b>PROFESSION:</b>
<b>PLACE OF BIRTH:</b>	<b>VISA TYPE:</b>
<b>NATIONALITY:</b>	<b>VISA NUMBER:</b>
<b>TELEPHONE:</b>	<b>VISA DATE:</b>
<b>EMAIL:</b>	<b>PASSPORT:</b>

<b>SPOUSE'S NAME:</b>	<b>SOC. SEC. NUMBER:</b>
<b>DATE OF BIRTH:</b>	<b>PROFESSION:</b>
<b>PLACE OF BIRTH:</b>	<b>VISA TYPE:</b>
<b>NATIONALITY:</b>	<b>VISA NUMBER:</b>
<b>TELEPHONE:</b>	<b>VISA DATE:</b>
<b>EMAIL:</b>	<b>PASSPORT:</b>

<b>MAILING ADDRESS:</b> <u>IN UNITED STATES</u>	<b>MAILING ADDRESS:</b> <u>IN FOREIGN COUNTRY</u>

<b>COUNTRY OF RESIDENCE:</b>	<b>DATE EST'D:</b>
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DEPENDENT NAME (First & Last)	BIRTH	MOS AT HOME	RELATIONSHIP	SOCIAL SECURITY NUMBER

### Income Sources (Enclose Documentation)

IDENTIFY WITH AN 'X'	U.S.	FOREIGN	IDENTIFY WITH AN 'X'	U.S.	FOREIGN
Alimony			Other Income (Kind)		
Business Income			Partnership (K-1)		
Commissions			Pensions		
Dividends			Rental Income		
Distributions			Salaries/Wages		
Estate (K-1)			Sale: Own Residence		
Farm Income			Sale: Other Real Estate		
Interest			Sales: Business Assets		
Installment Receipts			Sales of Stocks		
IRA Distributions			Social Security		
Lottery/Gambling			Tips		
Military BAS/BAH			Unemployment Income		

### Deductions and Credits

#### Casualties

Property Type:	Insurance Reimbursement:			
Description of Loss:	Value Before Loss:			
Cost of Property:	Value After Loss:			

Political			Religious		
Other			Other		

#### Education

Student:	Student:
Institution:	Institution:
Purpose:	Purpose:
Amount	Amount

**Interest Paid**

<b>Mortgage on Main Home</b>			<b>Mortgage on Second Home</b>		
Paid to Financial Institution			Paid to Financial Institution		
Paid to Individual			Paid to Individual		
Name:			Name:		
Address:			Address:		
SSN:			SSN:		
Points			Points		
Other Interest			Other Interest		
Doctors & Dentists			Prescriptions		
Glasses, Hearing Aids, etc.			Surgical Fees		
Health Insurance			Transportation		
Hospital			Other		

**Taxes**

Personal (auto)			Other		
Property			Type		
State and Local			Type		

**Various**

Alimony Paid			Professional Education		
Gambling Losses			Safe Deposit Box		
Investment Fees			Student Loan Interest		
IRAs			Tax Preparation Fee (2003)		
Job Hunting Expenses			Tools & Equipment		
Moving Expenses > 50 miles (list)			Tuition & Fees		
Professional Dues			Uniforms & Cleaning		

**Income & Expense Items**

**Sales of Stock**

Date Acquired	Date Sold	Description of shares	Purchase Price	Sales Price	Date Acquired	Date Sold	Description of shares	Purchase Price	Sales Price

**Business Income**

Business Income			Cost of Goods Sold		
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**Rental Income**

What is the original property cost?			What is the value of improvements?		
Rental Income			Royalty Income		

**Business or Rental Expenses**

Advertising			Other Interest		
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Auto			Pensions		
Cleaning			Postage		
Contract Labor			Professional Fees		
Commissions			Rent/Lease		
Condominium Fees			Repairs & Maintenance		
Depreciation			Supplies		
Dues & Subscriptions			Taxes & Licenses		
Equipment			Uniforms		
Equipment Rental			Telephone		
Management Fees			Travel		
Meals & Entertainment			Uniforms		
Miscellaneous			Utilities		
Mortgage Interest			Wages		

**Sale of Property**

<b>GAIN ON SALE</b>			<b>COST OF PROPERTY SOLD</b>		
Date of Sale:			Date of Purchase:		
Gross Sales Price			Purchase Price		
Expenses of Sale:			Attorney Fees		
Attorney Fees	( )	( )	Abstract		
Abstract	( )	( )	Appraisal		
Appraisal	( )	( )	Credit Report		
Commission	( )	( )	Real Estate Taxes		
Deed Preparation	( )	( )	Survey		
Recording Fees	( )	( )	Title Search		
Gain on Sale			Cost of Property Sold		

**Income & Withholding Taxes**

<u>You</u>					<u>Spouse</u>				
Describe	Gross	Withheld	Soc Sec	Other	Describe	Gross	Withheld	Soc Sec	Other
Annuity					Annuity				
Dividends					Dividends				
Interest					Interest				
Pension					Pension				
Soc Sec					Soc Sec				
Salary					Salary				

**Foreign Earnings**

<u>You</u>		<u>Spouse</u>	
Foreign Earned Income		Foreign Earned Income	
Foreign Taxes Paid		Foreign Taxes Paid	
Address of Foreign Employer		Address of Foreign Employer	
Foreign Employer Address in U.S.		Foreign Employer Address in U.S.	

**Estimated Tax Payments**

1st Quarter Estimated Payment		3rd Quarter Estimated Payment	
2nd Quarter Estimated Payment		4th Quarter Estimated Payment	

**Questions**

1. Did you file a tax return last year in your residence country?		12. If you are 70 1/2, are you receiving mandatory IRA payments?	
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2. Is your spouse a citizen of the United States?		13. What date did you arrive in your foreign country of residence?	
3. Are your dependents citizens of the United States?		14. What was the last year you filed Form 2555?	
4. Do you have children age 14 or under with investment income?		15. Do you rent or own your foreign country residence?	
5. Do you anticipate significant income changes next year?		16. Does your employer pay for your residence expenses?	
6. Are you or your spouse disabled?		17. Which family members do not live with you?	
7. Do you have investments in a foreign account?		18. Where do they reside?	
8. Do you have other income?		19. What if any is your share of ownership in a foreign corporation?	
9. Did you move during the past year?		20. Did you start a business during the year?	
10. Did you receive any educational benefits?		21. Did you make any gifts of over \$11,000?	
11. Have you done an inventory valuation of your assets?		22. Are you being audited by IRS on a prior year tax return?	

**NOTES**

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