

NON RESIDENT US INCOME TAX RETURN QUESTIONNAIRE

TAXPAYER INFORMATION

Tax Year January 1 to December 31, _____

COMPLETE THIS PAGE, THEN AN INCOME/EXPENSE SHEET FOR EACH PROPERTY RENTED OR SOLD IN THE TAX YEAR
IF MORE THEN 2 OWNERS PER PROPERTY, USE A NEW SHEET FOR EACH ADDITIONAL 2 OWNERS

Full Name of Property Owner _____ ITIN _____ Marital Status _____

Full Name of Second Owner _____ ITIN _____ Marital Status _____

Foreign Country Address _____ Telephone _____

_____ E-Mail _____

	Owner #1	Owner #2
Tax ID number	_____	_____
Country of Citizenship	_____	_____
In what country do you claim residence for tax purposes	_____	_____
Have you ever applied to be a green card holder (Lawful permanent resident of the US))	_____ Yes _____ No	_____ Yes _____ No
Were you ever a US Citizen	_____ Yes _____ No	_____ Yes _____ No
Were you ever a Green Card Holder	_____ Yes _____ No	_____ Yes _____ No
What was your visa type for current tax year	_____	_____
Have you ever changed your visa type?	_____ Yes _____ No	_____ Yes _____ No
Do you have other US source income	_____ Yes _____ No	_____ Yes _____ No

Dates of US entry & departure during the current tax year including days when you did not stay in own rental property

Owner #1		Owner #2	
Entry	Departure	Entry	Departure
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

- **Total number of days during tax year property used by you personally for vacation _____
- **Total number of days during tax year property used by family & friends no rental income collected _____
- **Total number of days during tax year property was unrentable due to major repairs or renovations _____
- **Total number of days rented _____

** If you have more than one rental property, please complete separate sheet of the above information for each property

FIRST TIME FILERS PLEASE PROVIDE THE FOLLOWING INFORMATION

- (1) ITIN for each owner or if no ITIN(s), copy of current unexpired passport for each owner
- (2) Copy of purchase closing statement for each property
- (3) If furnishings were included in purchase price, estimated value on closing date
- (4) If furniture package was purchased, copy of all receipt(s)

IF THIS IS THE FIRST YEAR DEE-JAY & ASSOCIATES WILL BE FILING YOUR TAX RETURNS, BUT YOU HAVE PREVIOUSLY FILED, PLEASE PROVIDE COPIES OF PREVIOUS YEARS TAX RETURNS AND ITEMS 2, 3 & 4 ABOVE.

How did you hear about Dee-Jay & Associates? _____

NON RESIDENT US INCOME TAX RETURN

INCOME & EXPENSES

Tax Year January 1 to December 31, _____

COMPLETE A SEPARATE SHEET FOR EACH RENTAL PROPERTY

Property Address _____

SHORT TERM VACATION RENTAL _____ **LONG TERM LEASE RENTAL** _____

Management Company _____ Contact _____

TOTAL NUMBER OF DAYS RENTED _____

PROVIDE COPIES OF RECEIPTS FOR ALL MAJOR IMPROVEMENTS, OR UPGRADES OF FURNITURE

INCLUDE COPIES OF MORTGAGE INTEREST STATEMENTS

INCOME

Management Rental Income (Include 1042-5)

Management Pool Heat Income

Owner Rental Income

Insurance Claims paid (include copies)

Gambling Income (include W-2G copies)

Interest Income (include 1099INT)

EXPENSES - Specify currency used but do not convert - ALL EXPENSES SHOULD BE ENTERED AT 100%

Advertising

Cleaning

Lawn/Pool/Pest Maintenance

Commission

Insurance

Legal & Professional Fees

Management Fees

Mortgage Interest (Provide Form 1098)

Repairs

Supplies (replacements)

Sales & Tourist Tax

Real Estate Tax

Tangible Tax

Utilities (Electric, Water, Cable, Telephone, Gas, Trash, Security)

Home Owners Dues

Licenses

Inspection Travel (Flight only 1 per year per owner)

Other (Please Specify)