

**1040NR TAX RETURN ORGANIZER (OTHER INCOME)**  
FOR INTERNAL USE ONLY BY THE BRUNTON – MCCARTHY CPA FIRM CHARTERED

**FOR CALENDAR YEAR \_\_\_\_\_ CURRENT DATE \_\_\_\_\_**

TO AVOID DELAY WITH YOUR RETURN PLEASE ANSWER ALL QUESTIONS AND PROVIDE COPIES OF NECESSARY DOCUMENTATION

1. Name \_\_\_\_\_ Phones: Home (US): \_\_\_\_\_ Home (Non-US): \_\_\_\_\_
  2. Address \_\_\_\_\_ Cell: \_\_\_\_\_ Office: \_\_\_\_\_  
\_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_
  3. U.S. taxpayer identification number, if any. Please do not give a non-U.S., (e.g. Canadian or UK) number \_\_\_\_\_
  4. Birth Date \_\_\_\_\_ [ ] Single [ ] Married/ Common Law [ ] Separated (by decree) [ ] Separated (not by decree)
  5. Dependent Children: Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Did each live with you all year? [ ] Yes [ ] No  
Children's U.S. taxpayer identification number, if any. (Please do not give a non-U.S., e.g. Canadian number) \_\_\_\_\_
  6. Country of Citizenship \_\_\_\_\_ Citizenship of Spouse \_\_\_\_\_ Country of Birth \_\_\_\_\_
  7. Did you have a "green card" during the year? [ ] Yes [ ] No If yes, date you acquired green card \_\_\_\_\_  
If no, have you applied for a green card? [ ] Yes [ ] No [ ] N/A If yes, when did you apply for a green card? \_\_\_\_\_  
Have you abandoned a green card, or relinquished US citizenship since February 2, 1995? [ ] Yes [ ] No  
Do you have any other U.S. visa? [ ] Yes [ ] No If "Yes", Type of Visa \_\_\_\_\_ Visa number, if any \_\_\_\_\_
  8. Country issuing your Passport \_\_\_\_\_ Country of Residence \_\_\_\_\_
  9. Were you ever a U.S. citizen or U.S. resident? [ ] Yes [ ] No. Was one of your parents ever a U.S. citizen? [ ] Yes [ ] No
  10. Purpose of your visit to the U.S. \_\_\_\_\_
  11. Did you abandon your permanent residence as an immigrant to the U.S. during the year? [ ] Yes [ ] No
  12. Dates you entered and left the U.S. during the above calendar year (i.e. the year for which your return is being prepared) \_\_\_\_\_
  13. Please provide and compute the following: Column A  
  
 Number of days you were in the U.S. in the above calendar year  
(i.e. the year for which your return is being prepared): \_\_\_\_\_  
  
 Number of days you were in the U.S. in the preceding calendar year: \_\_\_\_\_  
 Compute 1/3 of the days in the preceding year & place in Column A: \_\_\_\_\_  
  
 Number of days you were in the U.S. in the 2nd preceding calendar year: \_\_\_\_\_  
 Compute 1/6 of days in the 2nd preceding year & place in Column A: \_\_\_\_\_  
  
 Add the total days in Column A \_\_\_\_\_
- If the total of Column A is 183 days or more please complete the enclosed "closer connection" questionnaire. Please return the completed "closer connection" questionnaire to us with this form. In this case there is an important deadline for your U.S. tax return. Please act promptly.
14. Have you ever filed a U.S. income tax return? [ ] Yes [ ] No  
If Yes, give: Year(s) \_\_\_\_\_ Form Number \_\_\_\_\_ Where sent \_\_\_\_\_
  15. Did your spouse contribute to the support of any dependents? [ ] Yes [ ] No

Please complete reverse side also



**U.S. INCOME EARNED**

16. Did you ever work in the United States?  Yes  No  
 If yes did you have any stock options at that time?  Yes  No
17. Did you receive salary income from the United States during the year?  Yes  No  
 If yes, please attach a statement describing the payor, amount earned, related expenses, nature of employment, and number of days worked in the U.S. Please also provide the U.S. wage withholding Form W-2.
18. Did you receive business income from the United States during the year?  Yes  No  
 If yes, please attach a statement describing the nature of the business, the income and expenses for the year, assets purchased and information about U.S. office premises and U.S. agents.
19. Did you receive any rental income from U.S. real estate during the year?  Yes  No If yes, please contact our office.
20. Did you sell U.S. real estate during the year?  Yes  No If yes, please contact our office.
21. Did you receive any other income from U.S. sources?  Yes  No  
 If yes, please describe, including payor and amount \_\_\_\_\_
22. Did your spouse (if applicable) receive any U.S. income?  Yes  No
23. Will your spouse (if applicable) be filing a U.S. income tax return?  Yes  No

**OTHER**

24. Provide details and amounts of any taxes withheld or paid including date paid in the U.S. during the year. Also provide details of charitable contributions, casualty or theft losses in the U.S. and any business expenses.
25. **Have you answered all questions & supplied all documents requested on this questionnaire?**  Yes  No  
**If "No" please explain, otherwise your tax return may be delayed and/or the fee may be increased because of the extra time required.**
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Signed: \_\_\_\_\_

PLEASE RETURN TO: THE BRUNTON – MCCARTHY CPA FIRM CHARTERED 4710 NW 2ND AVENUE, #101, BOCA RATON, FL 33431  
 Tel: (561) 241-9991 Fax: (561) 241-6332 Email: [tax@taxintl.com](mailto:tax@taxintl.com) Website: [www.taxintl.com](http://www.taxintl.com)

**Please include a US \$350 retainer with this organizer.**

If you wish, retainers can be paid on-line with a credit card. Please go to our website [www.taxintl.com](http://www.taxintl.com) and scroll down to PayPal on the lower right hand side.