

1040-NR TAX RETURN ORGANIZER (FOREIGN ESTATE)

(FOR INTERNAL USE ONLY BY ABITOS ADVISORS, LLC)

FOR TAX RETURN YEAR ENDED _____ CURRENT DATE _____

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

PART I – GENERAL INFORMATION

- 1. Name of Decedent _____ Date of Death: _____
- 2. U.S Taxpayer Identification Number (Employer Identification Number), if any _____
- 3. Citizenship of decedent _____ Country of residence of the decedent _____
- 4. Decedent’s domicile at the time of death _____
- 5. Name of the executor and/or personal representative of the estate _____ E-Mail: _____
Address _____
Phones: (U.S.): _____ (Non-U.S.): _____ Cell: _____ Office: _____

PART II – U.S. INCOME

- 6. Nature of the Unites States activities of the estate _____
- 7. Has the estate ever filed a U.S. tax return? Yes / No _____
Please attach a copy unless it was prepared by us.
- 8. Did the estate receive any rental income from U.S. real estate? Yes / No _____
If “Yes”, please complete the separate organizer “U.S. Real Estate Organizer”.
- 9. Did the estate sell U.S. real estate during the year? Yes / No _____
If “Yes”, please complete the separate organizer “U.S. Real Estate Organizer”.
If the estate received the stamped IRS Form 8288-A (Copy B) from the IRS, please provide it to us. Attached / No _____
- 10. Did the estate receive any other income from U.S. sources such as partnership income, dividend income, etc.? Yes / No _____
If “Yes”, please describe, including payor and amount _____

PART III – OTHER

- 11. During the year did the estate make any distributions to U.S. citizens, green card holders, or other U.S. residents? Yes / No _____
- 12. During the calendar year did the estate pay U.S. expenses aggregating US \$600 or more to any individual, unincorporated business, or attorney? Yes / No _____
(Please only provide payments made to persons or entities in connection with the U.S. activity)
If “Yes”, please provide details _____
If “Yes”, did the estate file Form 1099-MISC and/or 1099-NEC for the above U.S. expenses? Yes / No _____
- 13. Did the estate pay or have withheld any U.S. federal or state income tax? Yes / No _____
If “Yes”, give details including payment dates and amounts _____

If you have not answered all questions & supplied all documents requested on this organizer, please explain, otherwise your tax return may be delayed and/or the fee may be increased due to the extra time required.

Signed: _____

PLEASE RETURN TO:

ABITOS ADVISORS, LLC
327 PLAZA REAL, STE 235, BOCA RATON, FL 33432

Tel: (561) 241-9991 Fax: (561) 826-9299 E-Mail: bsk@abitos.com Website: www.abitos.com

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