

# NON-RESIDENT INCOME TAX RETURN WORKSHEET

**for Year Ending 31 December 2023**

**THIS IS AN INFORMATIONAL WORKSHEET FOR INTERNAL USE. THIS IS NOT A TAX RETURN OR FORM TO BE FILED WITH THE I.R.S**

**PLEASE TYPE IN THE FIELDS OF THE DOCUMENT ON SCREEN, THEN PRINT. CONTENTS WILL NOT SAVE!**

**OWNER(S) CONTACT DETAILS (Page 1) Please complete all questions, failure to do so may results in delays:**

<b>FULL Owner's Legal Name as shown on ITIN or SSN!</b>			
% of Ownership:			
Marital Status ( <i>Married or Single?</i> ):			
Country of Citizenship:			
Type & Year of last US Tax Return:			
Country of Residence for tax purposes during this tax year:			
FULL Overseas Home Address: <i>THIS IS YOUR FULL TIME ADDRESS WHERE YOU LIVE (INC. POSTCODE/ZIP)</i>			
Date of Birth (MONTH-DAY-YEAR)			
Non USA Telephone Number:			
E-mail Address:			
Have you ever applied for a green card?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	
Were you ever: <i>(check all that apply)</i> (1)A U.S. Citizen (2)A green card holder	<input type="checkbox"/> US Citizen <input type="checkbox"/> Green card holder	<input type="checkbox"/> US Citizen <input type="checkbox"/> Green card holder	
Have you ever changed Visa Type?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	
US Visa held on Dec 31st 2023:			
Current Visa Control Number (if any):			
Current Visa Expiration Date:			
<i>At any time in 2023, did you receive, sell, send, exchange or acquire any financial interest in any virtual currency?</i>	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	
USA Arrival & Exit Dates in 2023:  <i>Please write dates in full form Example: April 15, 2023</i>	Entry Dates	Exit Dates	Entry Dates
Number of Days Present 2021:			
Number of Days Present 2022:			
Number of Days Present 2023:			
US SSN or ITIN No.			

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USA Rental Property Address:			
USA Telephone Number:			
Property Management Company during 2023:			
Property Mgmt Company Telephone Number:		<b>Total # Days Rented in 2023</b>	
Date Property First Rented: <i>Please Attach Copies of ALL Management Statements!</i>		<b>Short or Long Term Rental?</b>	
USA Property Purchase (first return only):	Date:	Amount \$:	
Furniture Package* (first return only):	Date:	Amount \$:	
*only if not included in property purchase price		<b>NEW CLIENTS: PLEASE ATTACH COPY OF CLOSING STATEMENT (HUD)</b>	

Would you like us to file your Tangible Personal Property Tax Return?  YES  NO **Please attach signed DR-405 which must be completed by April 1**

<b>INCOME</b> <i>(COLLECTED DURING 2023 ONLY)</i> (excluding sales and tourist tax!)	\$
Rental Income + Pool Heat (management company) (excluding sales and tourist tax!):	
Rental Income (owner's, U.S. & abroad) (excluding sales and tourist tax!):	
Other Income* Earned from U.S. Sources, eg. Bank %, dividends, etc: <i>Must Attach Copies of Documentation!</i>	
Details of Other:	

<b>EXPENSES</b> <i>(PAID DURING 2023 ONLY)</i>	\$ Mgmt. Co.	\$ Owner	<b>UTILITIES</b> <i>(PAID DURING 2023 ONLY)</i>	\$ Mgmt. Co.	\$ Owner
Air Fare			Electric		
Car Hire			Gas		
Legal, Accounting, & Prof Fees			Water/Sewage		
Commissions			Telephone		
Insurance			Cable T.V.		
Maintenance & Repairs			Licenses		
Pool Maintenance			Alarm		
Pest Control			Bank Charges		
Lawn Maintenance			Trash Removal		
Cleaning			H.O.A.		
Management Fees			Others <b>(MUST PROVIDE DETAILS)</b>		
Supplies (small items under \$500)			Others <b>(MUST PROVIDE DETAILS)</b>		
Advertising			Tangible Personal Property Taxes		
Mortgage Interest Attach form 1098 (annual interest statement from mortgage lender)			Real Estate Taxes Attach copy of bill if paid directly, if escrowed, amount shown on 1098		

List any purchases of furniture, improvements to property, etc over \$500. **Attach COPIES of receipts only, we cannot mail back originals.**

Description	Cost	Purchase Date