NON-RESIDENTINCOME TAXRETURN WORKSHEET

PRINT

for Year Ending 31 December 2026

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:

FULL Owner's Legal Name as shown on ITIN or SSN!		
% of Ownership:		
Marital Status *(Married or Single?)*:		
Country of Citizenship:		
Type & Year of last US Tax Return:		
Country of Residence for tax purposes during this tax year:		
FULL Overseas Home Address:		
THIS IS YOUR FULL TIME ADDRESS *WHERE **YOU** LIVE (INC. POSTCODE/ZIP)*		
Date of Birth (MONTH-DAY-YEAR)		
Non USA Telephone Number:		
E-mail Address:		
Have you ever applied for a green card?	☐ YES ☐ NO	☐ YES ☐ NO
Were you ever: *(check all that apply)* (1)A U.S. Citizen (2)A green card holder	☐ US Citizen ☐ Green card holder	☐ US Citizen ☐ Green card holder
Have you ever changed Visa Type?	☐ YES ☐ NO	☐ YES ☐ NO
US Visa held on Dec 31st 2026:		
Current Visa Control Number (if any):		
Current Visa Expiration Date:		
At any time in 2026, did you receive, sell, send, exchange or acquire any financial interest in any virtual currency?	☐ YES ☐ NO	☐ YES ☐ NO

USA Arrival & Exit Dates in 2026:	Entry Dates	Exit Dates	Entry Dates	Exit Dates
Please write dates in full form Example: April 15, 2026				
Number of Days Present 2024:				
Number of Days Present 2025:				
Number of Days Present 2026:				
US SSN or ITIN No.				

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for Year Ending 31 December 2026

USA Rental Property Address:				
USA Telephone Number:				
Property Management Company during 2026:				
Property Mgmt Company Telephone Number:			**Total # Days Rented in 2026**	
Date Property First Rented: *Please Attach Copies of ALL Management Statements!*			**Short or Long Term Rental?**	
USA Property Purchase (first return only):	Date:		Amount $:	
Furniture Package* (first return only):	Date:		Amount $:	
*only if not included in property purchase price	**NEW CLIENTS: PLEASE ATTACH COPY OF CLOSING STATEMENT (HUD)**			

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**

INCOME *(COLLECTED DURING 2026 ONLY)* (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: *Must Attach Copies of Documentation!*	
Details of Other:	

EXPENSES *(PAID DURING 2026 ONLY)*	$ Mgmt. Co.	$ Owner
Air Fare		
Car Hire		
Legal, Accounting, & Prof Fees		
Commissions		
Insurance		
Maintenance & Repairs		
Pool Maintenance		
Pest Control		
Lawn Maintenance		
Cleaning		
Management Fees		
Supplies (small items under $500)		
Advertising		
Mortgage Interest Attach form 1098 (annual interest statement from mortgage lender)		

UTILITIES *(PAID DURING 2026 ONLY)*	$ Mgmt. Co.	$ Owner
Electric		
Gas		
Water/Sewage		
Telephone		
Cable T.V.		
Licenses		
Alarm		
Bank Charges		
Trash Removal		
H.O.A.		
Others ***(MUST PROVIDE DETAILS)***		
Others ***(MUST PROVIDE DETAILS)***		
Tangible Personal Property Taxes		
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