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2015 TAX QUESTIONNAIRE for Non-Resident Taxpayers

Please complete the information below, review each question, check yes/no and provide additional information as necessary

PERSONAL INFORMATION

Taxpayer: Phone#: Email:

U.S. Status: ☐ Visa (Type) ☐ Other

Spouse: Phone#: Email:

U.S. Status: ☐ Visa (Type) ☐ Other

What is your Marital status as of December 31, 2015? ☐ Single ☐ Married ☐ Other, please specify

Of what country or countries were you a citizen or national during 2015?

YES NO

☐ ☐ Did your address change during the year? If yes, please provide us with the date you moved:
and your new address:

☐ ☐ Have you ever applied to be a green card holder (lawful permanent resident) in the US?
If you had a visa on the last day of 2015, what type?
Please provide us the date you first entered in the US with your current visa status?

☐ ☐ Did your visa status change? If yes, please list the change and the date of the change

☐ ☐ Did you file a U.S. tax return for any period? If yes, please give us the latest year and form number you filed

☐ ☐ Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, C-Corporation, trust, or REMIC?

☐ ☐ Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

☐ ☐ Did you buy or sell any stocks, bonds or other financial investment property in 2015?

☐ ☐ Did you have any debts cancelled or forgiven?

☐ ☐ Does anyone owe you money which has become uncollectible?

☐ ☐ Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ ☐ Did you incur a loss because of damaged or stolen property?

☐ ☐ Did you make any 2015 Federal or State estimated tax payments? If yes, please provide the following information:

Federal – Amount(s) & Date(s):

State – Amount(s) & Date(s):

☐ ☐ Did you apply an overpayment of 2014 taxes to your 2015 estimated tax (instead of being refunded)?

☐ ☐ If you have an overpayment of 2015 taxes, do you want the excess applied to your 2016 estimated tax (instead of being refunded)?

☐ ☐ Do you expect your 2016 taxable income and withholdings to be different from 2015?

☐ ☐ May the IRS discuss your tax return with your preparer?

☐ ☐ Was your home rented out or used for business?

☐ ☐ Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

Give the number of days (including vacation, non-workdays, and partials) you were present in the US during:

2013,

2014,

and 2015,

Please list below all the dates you entered and left the US during 2015:

Date Entered U.S.	Date Departed U.S.