

TAX ORGANIZER PAGE 2

The information requested on this page is only required if your order includes a Federal Nonresident Tax return to be prepared by Gary R. Engler & Company.

- 1) Of what country or countries were you a citizen or national during 2016? \_\_\_\_\_
- 2) In what country did you claim residence for tax purposes during 2016? \_\_\_\_\_
- 3) Have you ever applied to be a green card holder of the US? \_\_\_\_\_
- 4) Were you ever a US citizen or Green Card Holder? \_\_\_\_\_
- 5) If you had a visa on December 31, 2016, enter your visa type. \_\_\_\_\_ If you did not have a visa, enter your US immigration status on December 31, 2016 \_\_\_\_\_
- 6) Have you ever changed your visa type (nonimmigrant status) or US immigration status? \_\_\_\_\_. If you answered "yes", indicate the date and nature of the change. \_\_\_\_\_
- 7) List all dates you entered and left the US during 2016 (clearly mark "date entered" and "date left."  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 8) Give number of days (including vacation, nonworkdays, and partial days) you were present in the United States during: 2014 \_\_\_\_\_ 2015 \_\_\_\_\_ 2016 \_\_\_\_\_
- 9) Did you file a US income tax return for any prior year? \_\_\_\_\_. If "Yes" give the latest year and form number you filed. \_\_\_\_\_
- 10) Are you filing a return for a trust? \_\_\_\_\_. If "Yes", did the trust have a US or foreign owner under the grantor trust rules, make a distribution or loan to a US person, or receive a contribution from a US person? \_\_\_\_\_
- 11) Did you receive total compensation of \$250,000 or more during the tax year? \_\_\_\_\_ If "yes" did you use an alternative method to determine the source of this compensation? \_\_\_\_\_
- 12) If you are claiming exemption from income tax under a US income tax treaty with a foreign country, did you also claim these benefits in a prior tax year? \_\_\_\_\_ If so, which year(s)? \_\_\_\_\_
- 13) If you are claiming exemption from income tax under a US income tax treaty, were you subject to tax in a foreign country on that US exempt income? \_\_\_\_\_
- 14) What country issued you a passport? \_\_\_\_\_. Passport Number \_\_\_\_\_
- 15) Enter the type of US Visa (F, J, M, Q) (if any) you held during: 2010 \_\_\_\_\_, 2011 \_\_\_\_\_, 2012 \_\_\_\_\_, 2013 \_\_\_\_\_, 2014 \_\_\_\_\_, 2015 \_\_\_\_\_
- 16) Teachers & Trainees
  - a. For teachers: Name, address, & telephone number of the academic institution where you taught in 2016. \_\_\_\_\_
  - b. For trainees: Name, address, and telephone number of the director of the academic or other specialized program you participated in during 2016. \_\_\_\_\_
  - c. Were you present in the US as a teacher, trainee, or student for any part of 2 of the 6 prior calendar years (2010-2015)? Yes or No \_\_\_\_\_
- 17) Students
  - a. Enter the name, address, & telephone number of the academic institution you attended during 2016. \_\_\_\_\_
  - b. Enter the name, address, and telephone number of the director of the academic or other specialized program you participated in during 2016. \_\_\_\_\_
  - c. Were you present in the US as a teacher, trainee, or student for any part of more than 5 calendar years? Yes or No \_\_\_\_\_