

TAX ORGANIZER PAGE 2

The information requested on this page is only required if you need 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 2023? _____
- 2) In what country did you claim residence for tax purposes during 2023? _____
- 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, 2023, enter your visa type. _____ If you did not have a visa, enter your US immigration status on December 31, 2023 _____
- 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 2023 (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: 2021 _____ 2022 _____ 2023 _____
- 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: 2017 _____, 2018 _____, 2019 _____, 2020 _____, 2021 _____, 2022 _____
- 16) Teachers & Trainees
 - a. For teachers: Name, address, & telephone number of the academic institution where you taught in 2023. _____
 - b. For trainees: Name, address, and telephone number of the director of the academic or other specialized program you participated in during 2023. _____
 - c. Were you present in the US as a teacher, trainee, or student for any part of 2 of the 6 prior calendar years (2017-2022)? Yes or No _____
- 17) Students
 - a. Enter the name, address, & telephone number of the academic institution you attended during 2023. _____
 - b. Enter the name, address, and telephone number of the director of the academic or other specialized program you participated in during 2023. _____
 - 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 _____