



1040NR TAX RETURN ORGANIZER

FOR CALENDAR YEAR ENDED _____ CURRENT DATE _____

(Husband and Wife must each complete a separate organizer if rental real estate is jointly owned)

1. Name: _____
2. Phone: Office _____ Home _____ Cell _____
 _____ Fax _____
 Email _____
3. Address: _____
4. U.S. taxpayer identification number, if any _____ Birth Date _____
5. Marital Status: Single Married Widow(er) with Dependent Child
6. Your occupation _____

7. Details of Dependent Children that lived with you during the year:

Name	Date of Birth	U.S. Social Security # or ITIN	Citizenship

8. Countries of citizenship _____, _____
 Country of Birth _____ Were either of your parents U.S. citizens? _____
9. Have you abandoned a green card, or relinquished U.S. citizenship since 02/02/1995? Yes No
 Do you have any other U.S. visa? Yes No
 If yes, type _____ Visa number, if any _____
10. Purpose of your visits during the year to the U.S.

11. Dates you entered and left the U.S. during the last three calendar years

12. Have you ever filed a U.S. income tax return? Yes No
 If yes, Year _____ Form # _____



U.S. REAL ESTATE OWNED OR SOLD

(If we previously prepared a return for you, please provide information on changes or additions since the last tax return was prepared. If this is the first return we will have prepared for you, please provide a copy of prior years' 1040NR return..)

For each U.S. property you purchased, owned, or sold during the year, please attach a copy of the Deed and Settlement (Statement of Adjustments or Closing Statement) from the purchase and provide the following details:

- 13. Type of Property (i.e. home/condo) _____ Date Purchased _____
- 14. The property is owned: Solely by you Jointly with your spouse Other
- 15. Property Address _____
- 16. Cost (US\$) _____
- 17. Was the property purchased furnished or unfurnished? Furnished Unfurnished
- 18. If purchased furnished, what is a reasonable portion of the purchase price to allocate to the value of the furnishing? _____
- 19. Subsequent property improvements and furnishings purchased:

Description	Date	Cost CDN\$	Cost US\$

U.S. REAL ESTATE RENTALS OR PROPERTY SOLD

For each U.S. property for which you received rental income during the year, please provide the following:

20. Address: _____

21. Number of days during the year the property was:

a) Leased _____ b) Used personally _____ c) Vacant _____

During the "vacant" days, was the property offered for rent? [] Yes [] No

22. Rental income received (US\$) _____

23. Expenses incurred in year (list below or attach schedule) (US\$)

Description	Amount (US\$)	Description	Amount (US\$)
Advertising		Property taxes	
Cleaning & Maintenance		Repairs	
Commissions		Sales tax	
Insurance		Utilities	
Interest		Other (describe)	
Legal Fees			

U.S. REAL ESTATE SOLD

24. Did you sell U.S. real estate during the year? [] Yes [] No

If yes, please answer the following:

25. Was the property sold furnished or unfurnished? [] Furnished [] Unfurnished

26. Property address _____

27. Date sold _____ Selling Price _____ It was owned []

Solely by you [] Jointly with your spouse

28. Please attach a copy of the Sales Contract, and also the Settlement Statements (Statements of Adjustments) for both the purchase and sale of the property and also IRS Form 8288-A, if any.

OTHER U.S. INCOME

29. Did you receive any other income from U.S. sources other than real estate rental income?

30. [] Yes [] No If yes, please describe, including payor and amount
