



KBAUER LAW PLLC

Attorney At Law

kbauer@kbfinancials.biz

(863) 430-8165

www.kbfinancials.biz

PO BOX 755, Haines City FL 33845

TAX ORGANIZER FOR THE US RESIDENT / CHECKLIST POUR LE RESIDENT FISCAL AMERICAIN – TAX YEAR 2025

Personal Info / Etat civil		Phone / <i>Telephone</i>	=
Name / <i>Nom du contribuable</i>	=	Citizenship (s) / <i>Citoyennete (s)</i>	=
Occupation / <i>Activité aux USA</i>	=	Green card holder / <i>Carte verte</i>	=
Social Security number / <i>Numero SSN</i>	=	Status / <i>état civil (CIRCLE)</i>	= MARRIED / SINGLE
Relocated during the year / <i>Deménagement</i>	= YES / NO	IRS protection PIN / <i>PIN</i>	= YES / NO
IRS communication received?	= YES / NO	Blind / disabled / <i>Handicap</i>	= YES / NO
STATE communication received?	= YES / NO		
Residential address / <i>Adresse</i>	=		
If living outside the US, dates of entry & exit / <i>dates de séjour a l'exterieur des USA</i>	=		

Dependents / Personnes à charge		Lived with you all year	= YES / NO
Name / <i>Nom</i>	=	Full time student / <i>etudiant (CIRCLE)</i>	= YES / NO
Social Security number / <i>SSN</i>	=	Dependent's Income / <i>Revenu</i>	= YES / NO
Relationship / <i>Lien de parenté</i>	=	Child care expenses / <i>frais de garde</i>	= YES / NO
Disabled / <i>Handicap</i>	=		

Education	
Tuition Expenses / <i>Frais académiques</i>	= YES / NO
Student loan / <i>Emprunt scolaire</i>	= YES / NO
Education credits denied in prior years	= YES / NO

Business Income / Activite commerciale	
Single LLC / <i>LLC avec associé unique</i>	= YES / NO
Partnership / <i>LLC avec associé multiple</i>	= YES / NO
S / C-Corporations / <i>Société Incorporee</i>	= YES / NO
Trust / <i>Trust</i>	= YES / NO

Income / Revenu		Cancelled debt / <i>Annulation de créance</i>	= YES / NO
Employment income / <i>Salaire</i>	= YES / NO	Digital transactions (<i>Bitcoin, NFT, etc</i>)	= YES / NO
Self-employment / <i>travail indépendant</i>	= YES / NO	Gambling winnings / <i>Gains de Jeux</i>	= YES / NO
Interest / <i>Intérêt</i>	= YES / NO	Unemployment / <i>Chomage</i>	= YES / NO
Dividends / <i>Dividendes</i>	= YES / NO	Rental income / <i>Revenus immobiliers</i>	= YES / NO
Sale of assets / <i>Ventes de biens</i>	= YES / NO	Retirement distribution / <i>versement retraite</i>	= YES / NO
Social security income / <i>Securite sociale</i>	= YES / NO	Tips & overtime / <i>Pourboire et heures sup.</i>	= YES / NO
Grant, Scholarships / <i>Subvention, Bourse</i>	= YES / NO	Other income / Autre revenu	= YES / NO

Assisting Foreigners with their US tax obligations - Services fiscaux aux expatriés

Tax Professional



Chartered Certified Accountant



QuickBooks ProAdvisor



Deductions		Vehicle purchase / <i>Achat de véhicule</i>	= YES / NO
Medical expenses / <i>frais médicaux</i>	= YES / NO	Property tax / <i>Taxe foncière</i>	= YES / NO
Marketplace premiums / <i>Couverture médicale</i>	= YES / NO	Energy efficient (solar, electric, etc)	= YES / NO
Interest on loans / <i>intérêts d'emprunt & financement</i>	= YES / NO	Casualty & theft / <i>destruction & vol</i>	= YES / NO
Retirement contributions / <i>apport retraite</i>	= YES / NO	HSA account / <i>Compte santé « HSA »</i>	= YES / NO
Carryover / <i>Report des années précédentes</i>	= YES / NO	FSA account / <i>Compte santé « FSA »</i>	= YES / NO
Charitable contributions / <i>donation</i>	= YES / NO	Other deduction / Autre deduction	= YES / NO

Accounts outside the USA / Comptes a l'étranger			
Checking account / <i>Compte courant</i>	= YES / NO	Life Insurance / <i>Assurance vie</i>	= YES / NO
Savings account / <i>Compte epargne</i>	= YES / NO	Trust / <i>Trust</i>	= YES / NO
Brokerage account / <i>Compte portefeuille</i>	= YES / NO	Joint account / <i>Compte joint</i>	= YES / NO
Retirement account / <i>Compte Retraite</i>	= YES / NO	Other accounts / Autre comptes	= YES / NO

Transactions outside the USA / Transactions avec l'étranger			
Gifts / <i>Don étranger</i>	= YES / NO	Inheritance / <i>Héritage</i>	= YES / NO
Usufruct - Bare ownership / <i>donation partage - demembrement</i>	= YES / NO	Shareholder in entity / <i>Actionnariat</i>	= YES / NO
Foreign taxes paid / <i>impôts étrangers payés</i>	= YES / NO	Other transactions / Autre activite	= YES / NO

Tax payments		Inheritance tax / <i>droit de succession</i>	= YES / NO
Withholdings / <i>Retenues a la source</i>	= YES / NO	Estimated tax / <i>Acompte d'impôt</i>	= YES / NO
Gift tax / <i>droit de donation</i>	= YES / NO	Other tax payments / Autre impôt	= YES / NO

Other info / Autres infos	
----------------------------------	--

To the best of my knowledge, the information in this tax organizer is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records. The information in this document has been read and explained to me in a language that I understand.

Name, Signature, Date _____

Assisting Foreigners with their US tax obligations - Services fiscaux aux expatriés

Tax Professional



Chartered Certified Accountant



QuickBooks ProAdvisor

