



KBAUER LAW PLLC

Attorney At Law

kbauer@kbfinancials.biz

(863) 430-8165

www.kbfinancials.biz

PO BOX 755, Haines City FL 33845

GIFT TAX ORGANIZER / CHECKLIST POUR LA DONATION - 2024

DONOR / Donateur		Social Security number / <i>SSN</i>	=
Name / <i>Nom</i>	=	Status / <i>état civil (CIRCLE)</i>	= MARRIED / SINGLE
Phone / <i>Telephone</i>	=	American Citizenship	= YES / NO
Domicile country / <i>pays de domicile</i>	=	Other Citizenship	=
Residential address / <i>Adresse</i>			

DONEE / Beneficiaire - donataire			
DONEE #1		DONEE #2	
Name / <i>Nom</i>	=	Name / <i>Nom</i>	=
DOB / <i>Date de naissance</i>	=	DOB	=
Social Security number / <i>SSN</i>	=	SSN	=
Relationship / <i>Parenté</i>	=	Relationship / <i>Parenté</i>	=
Residential address	=	Residential address	=

GIFT / Don	
Description (<i>CIRCLE</i>)	= CASH / REAL ESTATE / STOCK / BONDS / DIGITAL ASSETS / LIFE INSURANCE
Amount / <i>Montant</i>	= \$
Appraisal done / <i>Evaluation faite</i>	= YES / NO
Date of gift / <i>Date de la donation</i>	=
Foreign tax paid on gift / <i>Impot étranger</i>	=

State taxes / impôts étatiques		Residence's state / <i>état de résidence</i>	=
Assets' state / <i>état des biens</i>	=	State payments / <i>reglement impôt</i>	= \$
STATE communication received / <i>courrier reçu de l'administration étatique</i>			= YES / NO
Transactions in other states / <i>transactions dans d'autres état</i>			= YES/ NO

OTHER / Autre information		Do you hold an IRS protection PIN ?	= YES / NO
IRS communication received?	= YES / NO	Have you filed prior US gift tax returns?	= YES / NO

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

