



KARINE BAUER, EA, JD
 Attorney at Law
 International Tax Services
 Email: kbauer@kbfinancials.biz
 (863) 430-8165
 Website: kbfinancials.biz
 POBOX 755, Haines City FL 33845

TAX ORGANIZER FOR THE US RESIDENT / CHECKLIST POUR LE RESIDENT FISCAL AMERICAIN - 2023

| Personal Info / Etat civil | | | |
|---|------------|-------------------------------------|--------------------|
| Name / <i>Nom du contribuable</i> | = | Phone / <i>Telephone</i> | = |
| Occupation / <i>Activité aux USA</i> | = | Citizenship/ <i>Citoyennete</i> | = |
| Social Security number / <i>Numero SSN</i> | = | Status / <i>état civil (CIRCLE)</i> | = MARRIED / SINGLE |
| Did you sale your home / <i>Vente de maison</i> | = YES / NO | IRS protection PIN / <i>PIN</i> | = YES / NO |
| IRS communication received? | = YES / NO | Multistate residence in US | = YES / NO |
| STATE communication received? | = YES / NO | Blind / disabled / <i>Handicap</i> | = YES / NO |
| Residential address / <i>Adresse</i> | = | | |

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

| Education | |
|---|------------|
| Tuition Expenses / <i>Frais académiques</i> | = \$ |
| Student loan / <i>Emprunt scolaire</i> | = \$ |
| 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 Incorporée</i> | = YES / NO |
| Trust / <i>Trust</i> | = YES / NO |

| Income / Revenu | | | |
|--|------|---|------------|
| Employment income / <i>Salaire</i> | = \$ | Cancelled debt / <i>annulation de créance</i> | = \$ |
| Self-employment / <i>travail indépendant</i> | = \$ | Tax refunds / <i>Remboursement d'impôt</i> | = \$ |
| Interest / <i>Intérêt</i> | = \$ | Digital transactions (<i>Bitcoin, NFT, etc</i>) | = \$ |
| Dividends / <i>Dividendes</i> | = \$ | Gambling winnings / <i>Gains de Jeux</i> | = \$ |
| Sale of assets / <i>Ventes de biens</i> | = \$ | Unemployment / <i>Chomage</i> | = \$ |
| Social security income / <i>Securite sociale</i> | = \$ | Rental income / <i>Location</i> | = YES / NO |
| Pension income / <i>Retraite</i> | = \$ | Other income / Autre revenu | = \$ |
| Grant, Scholarships / <i>Subvention, Bourse</i> | = \$ | | |



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 ATTORNEY AT LAW – INTERNATIONAL TAX

Updated 01/04/24

| | | | |
|---|------|---|------|
| Deductions | | | |
| Medical expenses / <i>frais médicaux</i> | \$ = | Vehicle purchase / <i>Achat d'une voiture</i> | \$ = |
| Marketplace premiums / <i>Couverture médicale</i> | \$ = | Property tax / <i>Taxe foncière</i> | \$ = |
| Interest on loans / <i>interet d'emprunt</i> | \$ = | Energy efficient (solar, electric, etc) | \$ = |
| Retirement contributions / <i>apport retraite</i> | \$ = | Casualty & theft / <i>destrubtion & vol</i> | \$ = |
| Charitable contributions / <i>donation</i> | \$ = | Other deduction / Autre deduction | \$ = |

| | | | |
|---|------|---|------|
| Foreign Activity / Transactions avec l'étranger | | Shareholder in entity / <i>Actionnariat</i> | \$ = |
| Checking account / <i>Compte courant</i> | \$ = | Gifts / <i>Don étranger</i> | \$ = |
| Savings account / <i>Compte epargne</i> | \$ = | Inheritance / <i>Héritage</i> | \$ = |
| Brokerage account / <i>Compte portefeuille</i> | \$ = | Employer / <i>retraite employeur</i> | \$ = |
| Trust / <i>Trust</i> | \$ = | Other activity / Autre transaction | \$ = |
| Life Insurance / <i>Assurance vie</i> | \$ = | | |
| If living overseas, dates of entry & exit from US / <i>dates de séjours aux USA</i> | | = | |

| | | | |
|--|------|---|------|
| Tax payments | | | |
| Gift tax / <i>droit de donation</i> | \$ = | Foreign taxes / <i>impôts étrangers</i> | \$ = |
| Inheritance tax / <i>droit de succession</i> | \$ = | State taxes / <i>impôts étatiques</i> | \$ = |
| Estimated tax / <i>Acompte d'impôt</i> | \$ = | Other tax payments / Autre impôt | \$ = |

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.

Name, Signature, Date _____



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