



**KBAUER LAW PLLC**

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**TAX ORGANIZER FOR THE US RESIDENT / CHECKLIST POUR LE RESIDENT FISCAL AMERICAIN - 2024**

<b>Personal Info / Etat civil</b>			
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
Relocated during the year / <i>Deménagement</i>	= YES / NO	IRS protection PIN / <i>PIN</i>	= YES / NO
<b>IRS</b> communication received?	= YES / NO	Blind / disabled / <i>Handicap</i>	= YES / NO
Residential address / <i>Adresse</i>			

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

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

<b>Business Income / Activite commerciale</b>	
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
Home office / <i>Bureau à la maison</i>	= YES / NO

<b>Income / Revenu</b>		Cancelled debt / <i>annulation de créance</i>	= \$
Employment income / <i>Salaire</i>	= \$	Digital transactions ( <i>Bitcoin, NFT, etc</i> )	= \$
Self-employment / <i>travail indépendant</i>	= \$	Gambling winnings / <i>Gains de Jeux</i>	= \$
Interest / <i>Intérêt</i>	= \$	Unemployment / <i>Chomage</i>	= \$
Dividends / <i>Dividendes</i>	= \$	Rental income / <i>Revenus immobiliers</i>	= \$
Sale of assets / <i>Ventes de biens</i>	= \$	Retirement distribution / <i>versement retraite</i>	= \$
Social security income / <i>Securite sociale</i>	= \$	<b>Other income / Autre revenu</b>	= \$
Grant, Scholarships / <i>Subvention, Bourse</i>	= \$		

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

Tax Professional



Chartered Certified Accountant



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

<b>State taxes / impôts étatiques</b>		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

<b>Outside the USA Activity / Transactions avec l'étranger</b>		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>	\$ =	<b>Other activity / Autre transaction</b>	\$ =
Life Insurance / <i>Assurance vie</i>	\$ =		
If living overseas, dates of entry & exit from US / <i>dates de séjours aux USA</i>	=		

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

<b>Other info / Autres infos</b>	
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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 \_\_\_\_\_

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