

CARBONARI

Tax Compliance & Consulting

Copyright 2024 CarbonariCPA.com

Expatriate Tax Organizer

(Save or copy this form for multiple assignments.)

Who worked in a foreign country? Taxpayer Spouse

Assignment start date:

Principal place of employment during the year:

Name of employer:

Employer's U.S. address:

Employer's foreign address:

Describe employer: A foreign entity A U.S. Company A foreign affiliate of a U.S. Company
 Other(describe)

Employee's foreign address:

Type of living quarters: Purchased house Rented house or apartment
 Rented room Quarters provided by employer

Did your family live with you abroad during any part of the taxable year? Yes No
If yes, who and for what period?

Did you maintain a home in the U.S. while living abroad? Yes No
If yes, was the home rented? Yes No

Provide the address of the home and the names and relationships of the occupants:

Indicate your type of visa and if it contains any limitations as to the length of your stay or the employment in the foreign country:

Are you subject to the income tax of the foreign country in which you reside? Yes No

Country of citizenship if not a U.S. Citizen:

Housing and Compensation

Indicate below (for yourself, spouse and dependents living with you), the amount of housing expense incurred (whether paid by you or your employer) in the foreign country.

Amount Paid by Your
Employer and Included
in Your Compensation*

Amount Paid by You
That is Not Reimbursable
by Your Employer

Rent

Utilities (but not telephone charges)

Property insurance

Nonrefundable deposits

Repairs and maintenance

Furniture rental

Other

*Your foreign wage statement should show housing expenses paid on your behalf.

**Please provide the following compensation information
that is applicable to your particular employment.**

Form W-2

Foreign wage statement prepared by your employer.

If self-employed, please provide a 2023 income statement or complete a self-employment tax organizer.

Foreign Tax Return

Foreign taxes paid in 2023 and 2024 related to 2023 compensation.

Foreign Travel Information

Provide travel details for 2023 and 2024 up to the date you complete this questionnaire.

Country (including U.S.)	Date Arrived	Date Departed	Days Worked in U.S.
--------------------------	--------------	---------------	---------------------

Foreign Bank Account Information

(Save or copy this form for multiple accounts.)

If at any time during 2023, you had a **financial interest** in a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country, please provide the information below for each account.

Who owns the account? Taxpayer Spouse Joint

What was the maximum value of account during 2023? (indicate currency too)

Indicate type of account: Bank Securities Account Other (e.g., Retirement)

Account number:

Name of financial institution:

Mailing address of financial institution:

If at any time during 2023, you had **signature authority** (but not a financial interest) over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country, please provide the information below for each account.

Name of owner of account:

Tax identifying number of owner:

Tax identifying number type:

EIN SSN/ITIN Foreign Unknown

Your title with this owner:

What was the maximum value of account during 2023? (indicate currency too)

Check if maximum value unknown.

Indicate type of account: Bank Securities Account Other (e.g., Retirement)

Account number:

Name of financial institution:

Mailing address of financial institution: