

FOREIGN EARNED INCOME Document Organizer

In order to complete your tax return for the period requested please provide the following:

- Provide the exact spelling of your name, social security number, date of birth.
- Your foreign address.
- Mailing address (this can be any address where you are able to receive your mail.)
- Please provide your telephone number, fax number and email address if available.
- If first time filing with us, please state the last year you filed your tax return. Fax or email a copy of the return.
- If married, provide spouse's name, Social Security Number, date of birth and state, if she is employed. Also provide Social Security Numbers and dates of birth for any children.
- Name and address of employer.
- Your Title/Position.
- Date employment began in the foreign country.
- Annual Income in US Dollar. Please provide a proof of income letter from employer or W-2 if applicable.)
- Amount received for housing allowances, car allowances (if any.)
- Dates you visited the US and departed (per passport records) during your employment overseas; and state the reason whether business trip or pleasure. If on business, indicate the amount earned while present in the US. (This income is not excludable.)
- Do you own or rent your foreign home? How much rent do you pay?
- Do you own a house in the US? If yes, provide address and state who occupies it.
- Due to the FBAR-Foreign Bank reporting requirement, please provide us with **All bank accounts**. Info to include: Bank name, address, account number, highest balance reached, interest earned and tax paid on interest.

Additional information may be requested to complete accurate filling.