

Tax Organizer for Non-Residents

PERSONAL INFORMATION	
Taxpayer's name	Spouse's name
Social Security or US TIN number	Social Security or US TIN number
Date of birth	Date of birth
<input type="checkbox"/> Single <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separate	Nationality: TP SP
U.S. Address	
Foreign Address	
Occupation	Spouse occupation
U.S. Visa on last day of 2020	U.S. Visa on last day of 2020
Mobile telephone	Spouse mobile telephone
E-mail	Spouse e-mail

DEPENDENTS			
Dependent's full name (Must match Soc Sec records)	TIN/Social Security #	Date of birth	Relationship to taxpayer

OTHER INFORMATION	
Country in which you claim tax residence for 2020?	
Have you ever applied for a U.S. Green Card? Yes No	Were you ever a U.S. Green Card holder?
Were you ever a U.S. Citizen? Yes No	
Have you ever changed your U.S. visa or immigration status?	If so, indicate date and nature of change:
Have you filed a U.S. tax return for any prior year? Yes No	If so, list year and tax form filed:
Did you receive total compensation of \$250,000 or more for 2020?	Yes No

Dates in the U.S. in 2020			
Date Entered U.S.	Date Departed U.S.	Date Entered U.S.	Date Departed U.S.

Days in the U.S. 2020 and 2 prior years		
Number of days in 2020	Number of days in 2019	Number of days in 2018

Letter of Engagement between Lewis Holman, EA, and

Taxpayer:

Spouse:

This confirms our understanding of the terms of our agreement and outlines the nature and extent of services we will provide. Based upon the information you furnish to us, we will prepare your 2020 Federal and applicable state income tax returns.

We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and include all other information necessary for the completion of your tax return.

All income tax returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will be available upon request to represent you, or to review the results of any examination. Billing for these additional services will be at our standard rates.

The charges for our services are based on our fee schedule and the complexity of the returns. We provide estimates of our fee to prepare tax returns in advance of engagement if requested.

You have the final responsibility for your income tax returns. Please review them carefully before you sign and mail them.

If the above is in accordance with your understanding of the terms and conditions of our agreement, please sign below.

Taxpayer

Spouse

date

date