

## ADDITIONAL TAX QUESTIONNAIRE 2023

(If you lived in the USA all of 2023, you can skip the first 8 questions.)

Your Name \_\_\_\_\_

YES   NO

- |   |                          |                          |
|---|--------------------------|--------------------------|
| 1) Will you be living in the USA on April 15, 2024 ?                        | <input type="checkbox"/> | <input type="checkbox"/> |
| 2) Was 2023 your first year (either entire or partial) of overseas service? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3) Were you in the USA at any time during 2023?                             | <input type="checkbox"/> | <input type="checkbox"/> |

USA Travel Dates for 2023 (Please include dates for travel TO and FROM the USA)

From (Country)	Date Left mm/dd/yy	Destination (Country)	Date Arrived	Business / Personal*

\* Indicate B (business) or P (personal) if your travel was to the USA

- |  |                          |                          |
|--|--------------------------|--------------------------|
| 4) Have you made a statement to the authorities of a foreign country in which you claim to be a bona fide resident that you are NOT a resident of that country?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 5) Are you required to pay income taxes to a foreign country?<br>If yes,<br>Specify country _____<br>Specify income _____<br>Foreign income tax paid (USD) _____   | <input type="checkbox"/> | <input type="checkbox"/> |
| 6) Did you maintain a house that you consider your home in the USA?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 7) Enter foreign office address and your address in the country where you lived during 2023.<br>Foreign Office Address _____<br>Foreign Home Address _____   |                          |                          |
| 8) Type of VISA under which you entered the foreign country _____<br>Indicate the type of VISA now held _____<br>Did your VISA contain limitations for the length of your stay or employment?<br>If yes, what were the limitations? _____  | <input type="checkbox"/> | <input type="checkbox"/> |
| 9) Do we need to file a state tax return for you? ( <b>Please check your state's tax filing requirements.</b> )<br>(If you own property, have state income and/or resided in a U.S. state more than one month in 2023, you may need to file a state tax return.)<br>Yes, I want a state tax return prepared for the state of _____<br>As a:           Part-year resident <input type="checkbox"/><br>Full-year resident <input type="checkbox"/><br>Non-resident <input type="checkbox"/><br>No, I do not need to file a state tax return <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10) Do you have funds in a financial institution that pays interest, dividends, etc.?<br>If yes, please provide Form 1099 for each account.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 11) Did you sell any stock, bonds, or mutual funds in 2023?<br>If yes, provide Form 1099-B for each investment account, and cost basis information if not on 1099-B.   | <input type="checkbox"/> | <input type="checkbox"/> |

Your Name \_\_\_\_\_

YES NO

12) Did you receive any distributions from or contributions to an IRA, pension, 401(k), in 2023?    
If yes, provide Form 1099-R for each distribution, and/or information regarding your contributions.

13) Did you sell a residence in the USA or foreign country during 2023?    
If yes, please provide the following information:  
a. Closing statement for sale of property  
b. Closing statement for purchase of property  
c. Details regarding improvements (date, description, amount)  
d. Expenses relating to the sale of property  
e. Dates you resided in property, if applicable

14) Do you own rental property?    
If yes, please provide year-end totals of income and expenses (insurance, mortgage interest, property tax, repairs & maintenance, HOA dues, etc.)  
- If you lived in your rental property during 2023, please indicate dates  
From \_\_\_\_\_ To \_\_\_\_\_  
- If 2023 is the first year of rental, please provide the following information:  
Closing statement for purchase of property  
List of expenses incurred to get the property ready to rent  
Date rental period started

15) Did you pay any expenses for higher education during 2023?    
If yes, please provide the following information:  
a. Name of student(s) and relationship  
b. Detail of expenses paid  
c. Year of education completed during 2023  
d. Form 1098-T from each educational institution

16) At any time during 2023, did you have a financial interest in, or a signature authority over a personal or ministry financial account (such as a bank account, securities account, or brokerage account) located in a foreign country?

17) Did the **total** value of **all** foreign financial accounts you had financial interest in or signature authority over, exceed \$10,000 at any time during 2023?

18) Did you operate a business during 2023?    
If yes, please provide year-end totals of income and expenses (supplies, insurance, etc.)

19) Are you exempt from Social Security taxes because you filed Form 4361?

20) Regarding housing allowance and expenses, the IRS allows an exclusion from income for federal income tax purposes, the lowest of the following:  
Total housing allowance you received in 2023 (Box 14 of Form W-2) \_\_\_\_\_  
Total housing expenses you paid on your primary residence in 2023 (mortgage/rent, prop tax, utilities, trash, insurance, maint/repairs, landscaping/gardening, HOA dues, security, etc.) \_\_\_\_\_  
Fair rental value of your primary residence? \_\_\_\_\_  
(The following link may help - <https://www.freechurchaccounting.com/fair-rental-value.html>)

I do hereby certify that, to the best of my ability, I have supplied all the information required by the Internal Revenue Service that applies to my personal income tax matters on both the Tax Questionnaire and the Tax Organizer.

Signature \_\_\_\_\_

Date \_\_\_\_\_