ADDITIONAL TAX QUESTIONNAIRE 2023

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

Your	Name
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1) Will you be living in the USA on April 15, 2024?

2) Was 2023 your first year (either entire or partial) of overseas service?

3) Were you in the USA at any time during 2023?

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?
- 5) Are you required to pay income taxes to a foreign country?

If	yes,
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As a:

Specify country		
Specify income		
Foreign income tax	paid (USD)	

6) Did you maintain a house that you consider your home in the USA?

7) Enter foreign office address and your address in the country where you lived during 2023. $\sum_{i=1}^{n} \sum_{j=1}^{n} \sum_{i=1}^{n} \sum_{i=1}^{n} \sum_{i=1}^{n} \sum_{i=1}^{n} \sum_{i=1}^{n} \sum_{i=1}^{n} \sum_{i=1}^{n} \sum_{i=1}^{n} \sum_{i=1}$

Foreign Office Address	
Foreign Home Address	

8) Type of VISA under which you entered the foreign country Indicate the type of VISA now held

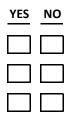
Did your VISA contain limitations for the length of your stay or employment? If yes, what were the limitations?

- 9) Do we need to file a state tax return for you? (Please check your state's tax filing requirements.) (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.)
 - Yes, I want a state tax return prepared for the state of
 - Part-year resident
 - Full-year resident
 - Non-resident

No, I do not need to file a state tax return

- 10) Do you have funds in a financial institution that pays interest, dividends, etc.? If yes, please provide Form 1099 for each account.
- 11) Did you sell any stock, bonds, or mutual funds in 2023?

If yes, provide Form 1099-B for each investment account, and cost basis information if not on 1099-B.



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? 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 <u>lowest</u> 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 - <u>https://www.freechurchaccounting.com/fair-rental-value.html</u>) 	

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