2024 NonResident Alien Tax Organizer

Thank you for choosing our firm on helping your 2024 individual tax return preparation and filing.Please fill out this “2024 Individual Tax Organizer”.

If we prepared your prior year returns, and there is no change on your personal information, you can skip part I.

If we did not prepare your prior year returns, please provide a copy of federal and state returns for the previous year.

**Note:Please provide us the supporting documents for your tax return preparation, send the scanned copy and this organizer to**

**Tax@chen.cpa****.**

**The tax return filing due date is 4/15/2025. Please file an extension before 4/15/2025 if you cannot get your return filed before the due date. Please note, extension is only extend the time to file the return, it doesn’t extend the tax to make tax payments. If you need help on filing extension, please contact us. Our service fee for fiiing extension is $50.**

If you received any of the following forms, please check and provide us the copy.

* 1098 (Mortgage Interest，From Lender)
* K-1 (Shareholder Income, From S Corporation)
* K-1 (From Trust or Estates)
* 1098-E (Student Loan Interest）
* Sales of real estate properties. Please provide Buyer’s Final Settlement Statement, Seller’s Final Settlement Statement, and any improvement cost. Form 8288A Copy B & Form 593 if there was a tax withheld.

 Apply for an ITIN, please provide passport and Visa copy, US mailing address and home country address

1: Personal Information. Please provide copy of the social security card and driver license. If not, please provide other photo ID.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Taxpayer | Spouse | Dependent 1 | Dependent 2 | Dependent 3 |
| Full Name |  |  |  |  |  |
| SSN |  |  |  |  |  |
| DOB |  |  |  |  |  |
| Mailing Address |  |
| Email |  |
| Cell |  |  |  |  |  |
| Occupation |  |  |  |  |  |
| Marital Status |  |  |  |  |  |
| Immigration Status |  |  |  |  |  |
| Health Insurance Coverage  |  |  |  |  |  |
| Relationship |  |  |  |  |  |
| Bank Info (Used for direct deposit the refund or make tax payments) | Name of the Bank: | Bank Routing Number: |
| Checking Account Number: |
| New Immigrant Information |
| Green Card Starting Date |  |  |  |  |  |
| Visa before GC |  |  |  |  |  |
| Days in the U.S. in 2022 |  |  |  |  |  |
| Days in the U.S. in 2023 |  |  |  |  |  |
| 2024 Travel History |  |  |  |  |  |
| F1/OPT, B1/B2，and Other Non-Resident Aliens |
| Days in the U.S. in 2022 |  |  |  |  |  |
| Days in the U.S. in 2023 |  |  |  |  |  |
| 2024 Travel History |  |  |  |  |  |
| Visa Type (Provide the date and detail if there is a change of status): |
| Green Card Application (Provide the date and detail if yes): |
| 2023 Tax Return（1040NR、1040NR EZ?,Please provide a copy）： |
| Full Home Country Mailing Address, including Zipcode |

2: Income Information. Please provide the amount in the form and supporting forms. Please report U.S. income only.

|  | Taxpayer |
| --- | --- |
| Business Investment (Form K1) |  |
| Rental Income（Please provide Income and Expenses Summary and supporting documents） |  |
| Other Income (Sales of property, etc.) |  |

3：Rental Income

|  |
| --- |
| Please provide rental agreement, expense receipts.Please provide the Final Settlement Statement if the property was purchased in 2024. |
|  | Rental 1 | Rental 2 | Rental 3 |
| Property Owner Name |  |  |  |
| Type of Property |  |  |  |
| Property Address |  |  |  |
| Purchase Date |  |  |  |
| First Rental Date |  |  |  |
| Rental Days |  |  |  |
| Cost Basis |  |  |  |
| Rents Received |  |  |  |
| Rental Expenses |
| Advertising |  |  |  |
| Cleaning & Maintenance |  |  |  |
| Commissions |  |  |  |
| Insurance |  |  |  |
| Management Fees |  |  |  |
| Mortgage Interest |  |  |  |
| Repairs |  |  |  |
| Supplies |  |  |  |
| Property Taxes |  |  |  |
| Utilities |  |  |  |
| HOA Fees |  |  |  |
| Internet and Phone |  |  |  |
| Other Expenses |  |  |  |

 4：Sales of Real Property

|  |
| --- |
| Please provide Buyer’s Final Settlement Statement (when you purchased it), Seller’s Final Settlement Statement (when you sell it)，and any capital improvement you spent on this property. Any rental activity, please provide your previous returns. Any tax withholding, please provide Form 8288A Copy B & Form 593。 |
| Is it an investment property? | Yes No |
| Is it your primary residence? | Yes No |
| Please provide the days used for primary residence for the last 5 years. |  |
| Any capital improvement, please provide the description, date, and amount spent：[**房地产 之 持有/出售投资房产如何抵税？**](https://www.chen.cpa/wp-admin/post.php?post=1206&action=edit)<https://www.chen.cpa/newsletter/1206/> |
| **Capital Improvement Detail** | **Project Completed Date** | **Amount Spent** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

5: Estimated Tax Payment

|  |  |
| --- | --- |
| Federal | State |
| Payment Date | Amount | Payment Date | Amount |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**The above listed items are the main items for nonresident tax returns. It is not including al items to be filed. Please use it for your reference only. If you have any other filing requirements, please let us know. Please fill in the above forms completely, any blank items are deemed to be none.**

**Please note, U.S. resident aliens need to report worldwide income, while the nonresident aliens only have to report U.S. sourced income.**

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**By my signature below, I certify the information I provided on and in connection with this form is true and correct to the best of my knowledge. I also understand that any false statements or deliberate omissions on this form may subject me to legal responsibility.**

Taxpayer Signature： Date：