



2014  
**Tax Organizer**  
 U.S. Visa holder

Greg Vath, EA  
 (612) 437-3365  
 gregvath@taxdynamic.com  
 www.taxdynamic.com

**Tax Payer Information**

Preferred Name \_\_\_\_\_

Last \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

SSN/ITIN \_\_\_\_\_ DOB (month/day/yr) \_\_\_\_\_ Occupation \_\_\_\_\_

Date first arrived in U.S. \_\_\_\_\_ Days present in U.S. 2013 \_\_\_\_\_ 2013 \_\_\_\_\_ 2012 \_\_\_\_\_ 2011 \_\_\_\_\_

Work email \_\_\_\_\_ Personal email \_\_\_\_\_

Cell # \_\_\_\_\_ Home # \_\_\_\_\_ Work # \_\_\_\_\_

U.S. Address \_\_\_\_\_ Apt no \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Foreign Address \_\_\_\_\_ Country \_\_\_\_\_

City \_\_\_\_\_ Province/State \_\_\_\_\_ Postal Code \_\_\_\_\_

**Spouse Information**

Preferred Name \_\_\_\_\_

Last \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

SSN/ITIN \_\_\_\_\_ DOB (month/day/yr) \_\_\_\_\_ Occupation \_\_\_\_\_

Date first arrived in U.S. \_\_\_\_\_ Days present in U.S. 2013 \_\_\_\_\_ 2013 \_\_\_\_\_ 2012 \_\_\_\_\_ 2011 \_\_\_\_\_

Work email \_\_\_\_\_ Personal email \_\_\_\_\_

Cell # \_\_\_\_\_ Home # \_\_\_\_\_ Work # \_\_\_\_\_

**Children and Dependents**

Last \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

SSN/ITIN \_\_\_\_\_ DOB (month/day/yr) \_\_\_\_\_ Relationship \_\_\_\_\_

Date first arrived in U.S. \_\_\_\_\_ Days present in U.S. 2013 \_\_\_\_\_ 2013 \_\_\_\_\_ 2012 \_\_\_\_\_ 2011 \_\_\_\_\_

Last \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

SSN/ITIN \_\_\_\_\_ DOB (month/day/yr) \_\_\_\_\_ Relationship \_\_\_\_\_

Date first arrived in U.S. \_\_\_\_\_ Days present in U.S. 2013 \_\_\_\_\_ 2013 \_\_\_\_\_ 2012 \_\_\_\_\_ 2011 \_\_\_\_\_

Last \_\_\_\_\_ First \_\_\_\_\_ Middle \_\_\_\_\_

SSN/ITIN \_\_\_\_\_ DOB (month/day/yr) \_\_\_\_\_ Relationship \_\_\_\_\_

Date first arrived in U.S. \_\_\_\_\_ Days present in U.S. 2013 \_\_\_\_\_ 2013 \_\_\_\_\_ 2012 \_\_\_\_\_ 2011 \_\_\_\_\_

**Documents Needed** (not a complete list)

- W-2 Wage income
- 1099-INT Interest income
- DIV Dividend income
- B Sale of stocks
- MISC Self-employment and miscellaneous income
- R Retirement distributions (IRAs, 401k, etc.)
- SA Distributions from health savings account (HSA)
- 1098-T Student tuition

**Other Information**

- Copy of previous years' tax returns
- Income while working outside U.S.
- Moving expenses paid by you
- Bank routing and account number for direct deposit

Did you have any foreign banking or financial accounts in 2014? Yes \_\_\_ No \_\_\_

Did the value of these accounts together exceed \$10,000 on any given day? Yes \_\_\_ No \_\_\_

Did you receive a distribution from a foreign trust? Yes \_\_\_ No \_\_\_

Were you the grantor of or transferor to a foreign trust? Yes \_\_\_ No \_\_\_

Did you own any foreign financial assets with a FMV in excess \$50,000 in 2014? Yes \_\_\_ No \_\_\_