|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **FOREIGN TAX ORGANIZER** | | | | | | | |
| Client Name or Names: | | |  | | | | |
| Address: | | | | | | | |
| Primary ITIN: | | | | Spouse ITIN (if an LLC Owner): | | | |
| Primary Date of Birth: / / | | | | Spouse (if an LLC Owner): / / | | | |
| Email: | | | | Spouse Email (if an LLC Owner): | | | |
| **SCH OI** | | | | | | | |
| Country of Citizenship: | | | |  | | | |
| Country of Residence: | | | |  | | | |
| Have you ever applied for a green card? | | | | Primary (circle): Y N  Spouse (if an LLC Owner): Y N | | | |
| Have you ever been a US citizen? | | | |  | | | |
| Have you ever been a green card holder? | | | | Primary (circle): Y N  Spouse (if an LLC Owner): Y N | | | |
| Did you have a visa as of 12/31? | | | | Primary (circle): Y N  Spouse (if an LLC Owner): Y N | | | |
|  | | | |
| How many days were you present in the United States during: | | | | | | | |
| Primary | 2019: |  | | 2020: |  | 2021: |  |
| Secondary | 2019: |  | | 2020: |  | 2021: |  |
| If you traveled to the US during 2021, please provide: | | | | | | | |
| Date of entry to the US mm/dd/yyyy: | | | | Date of departure from US mm/dd/yyyy: | | | |
|  | | | |  | | | |
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| **INCOME** | | | | | | | |
| Please attach: | | | | | | | |
| 1. The December 31, 2021 management company year-end summary of income/expenses for each property. | | | | | | | |
| 1. If there were any expenses that you paid directly out of the LLC bank account, or your personal accounts, that are not listed on the management company statements, please fill in that information for each property on the Rental Property Organizer attached. 2. Documents that show any other income from US sources. Examples include: Form 1099(SSA, INT, DIV, Ret., Misc. and S), Form W-2, Form K-1(Part, S Corp, and Fid.), and Form 1042. | | | | | | | |
| For purchased/sold properties: | | | | | | | |
| 1. Attach the two column “Settlement Statement” for each property bought or sold in 2021. If you sold property | | | | | | | |
|  | | | | | | | |
| **DISTRIBUTIONS** | | | | | | | |
| Please let us know the amount of any distribution or contribution to or from an owner from the LLC, or spent out of the LLC account for the owner’s non-LLC expenses during 2021. | | | | | | | |
| LLC Name | | | | Amount Distributed  (or spent on non-LLC related items) | | | |
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Additional Information, Comments or Questions: (Attach any correspondence from US tax agencies)