AMERICANEXPAT TAX SERVICES

Simplified Questionnaire
For US Returns

Date _____

Please review each section carefully and provide the required details. We **require that all clients submit this information annually—even if there have been no changes to your situation**. This allows us to remain fully compliant with industry regulations and continue delivering the highest level of service.

TAXPAYER

1. Full Name (per SSA Card): _____
2. Preferred Name: _____
3. Legal Gender: ☐ Male ☐ Female
4. Are you disabled? ☐ Yes ☐ No
5. Date of Birth: _____
6. SSN#/ITIN#: _____
7. Did you receive an IP PIN letter from the IRS in January? ☐ Yes ☐ No

If yes, please upload letter to your client portal.

8. Select all that apply:

☐ US Citizen
☐ Canadian Citizen
☐ Green Card Holder
☐ Other _____

9. Visa type: _____
10. Occupation: _____
11. Email Address: _____
12. Phone Number: _____

SPOUSE

Full Name (per SSA Card): _____
Preferred Name: _____
Legal Gender: ☐ Male ☐ Female
Are you disabled? ☐ Yes ☐ No
Date of Birth: _____
SSN#/ITIN#: _____
Did you receive an IP PIN letter from the IRS in January? ☐ Yes ☐ No

If yes, please upload letter to your client portal.

Select all that apply:

☐ US Citizen
☐ Canadian Citizen
☐ Green Card Holder
☐ Other _____

Visa type: _____
Occupation: _____
Email Address: _____
Phone Number: _____

13. Address: _____ City: _____
Province/State: _____ Postal/Zip Code: _____ Country: _____

14. Marital Status as of Dec 31st: ☐ Single ☐ Married ☐ Common-Law ☐ Separated ☐ Divorced ☐ Widowed
15. Did your marital status change in the year? ☐ Yes ☐ No If yes, date of change? _____

Please answer all questions on the following pages.

For any questions which you are unsure of the answer, **please select unsure**

	TAXPAYER			SPOUSE		
	Yes	No	Unsure	Yes	No	Unsure
1. Number of children and or dependents:	_____			_____		
2. Are any disabled?						
3. *Select all that apply*: Childcare Expenses						
Education Expenses						
Medical Expenses						
Other						

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	TAXPAYER			SPOUSE		
	Yes	No	Unsure	Yes	No	Unsure
4. Have you moved in the last calendar year?						
A. Was it to a new state/province/country?						
B. If yes, what was the prior state/province/country?	_____			_____		
5. Are you working from home?						
6. Are you self-employed?						
A. Is the business incorporated?						
B. In what country?	_____			_____		
C. Is it a partnership?						
D. In what country?	_____			_____		
7. Are you currently managing the estate of someone who has passed away?						
8. Did you make any gifts over $16,000USD?						
9. Did you receive a gift/bequest/inheritance worth over $100,000USD?						
10. Do you own a retirement, pension, or education plan outside of the US?						
11. Do you own/have signing authority on or contribute to financial accounts outside of the US (see FBAR Quicksheet)?						
A. If yes, did the total combined value of these accounts exceed $10,000 USD?						
12. Did you sell any property in the tax year (real estate, stock, bonds, mutual funds, etc.) ?						
13. Are you planning to sell your home?						
14. Did you make any energy efficient improvements to your principal residence prior to 2025 (located in the United States only)?						
15. Do you own rental property?						
A. Where is it located?	_____			_____		
16. Did you earn investment income from assets (stocks, mutual funds, ETFs) outside of the US?						
17. Did you purchase, sell, mine, trade, own, acquire crypto or virtual currency?						
18. Did you make any estimated tax payments to the IRS or to a State Tax Authority during the year? *Please upload proof of payment(s).*						
19. Do you have a bank account in the United States and authorize direct deposit with tax authorities?						
20. Do you authorize direct debit?						

21. If yes, please provide the following:	
Bank Name:_____	Bank Name:_____
Account Number:_____	Account Number:_____
Routing Number:_____	Routing Number:_____

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