

**1040NR NON-RESIDENT TAX RETURN ORGANIZER – Real Estate Income**

An electronic version of this form is available on our website: <https://taylorleibow.com/specialties/us-tax-services/>

**FOR CALENDAR YEAR ENDED \_\_\_\_\_ CURRENT DATE \_\_\_\_\_**

*(Each spouse must each complete a separate organizer if rental real estate is jointly owned)*

1. Name: \_\_\_\_\_
2. Phone: \_\_\_\_\_  Cell  Work  Home
3. Email: \_\_\_\_\_
4. Address: \_\_\_\_\_
5. U.S. taxpayer identification number, if any \_\_\_\_\_
6. Birth Date \_\_\_\_\_
7. Marital Status:  Single/Common-Law  Married  Widow(er) with Dependent Child
8. Your occupation \_\_\_\_\_
9. Countries of citizenship \_\_\_\_\_ , \_\_\_\_\_  
Country of birth \_\_\_\_\_  
Were either of your parents U.S. citizens? \_\_\_\_\_
10. Have you ever abandoned a green card, or relinquished U.S. citizenship?  Yes  No
11. Do you have a U.S. visa?  Yes  No  
If yes, type \_\_\_\_\_ Visa number, if any \_\_\_\_\_  
Provide details of any changes to your Visa status in the year:  
\_\_\_\_\_
12. List all the dates you entered and left the U.S. during the calendar year:

Date Entered	Date Departed	Purpose of Visit	Date Entered	Date Departed	Purpose of Visit

13. Total Number of days present in the U.S. during: 2023 \_\_\_\_\_ 2022 \_\_\_\_\_ 2021 \_\_\_\_\_
14. Have you ever filed a U.S. income tax return?  Yes  No  
If yes, Year last filed \_\_\_\_\_ Form # \_\_\_\_\_
15. If you have a bank account located in the US and wish to receive your refund by direct deposit, please provide us with a copy of a VOID cheque for your US located account.

**HAMILTON OFFICE**

7th Floor – 105 Main St E Phone: 905-523-0000  
Hamilton, ON L8N 1G6 Fax: 905-523-4681

**BURLINGTON OFFICE**

103 – 3410 South Service Rd Phone: 905-637-9959  
Burlington, ON L7N 3T2 Fax: 905-637-3195

**1040NR NON-RESIDENT TAX RETURN ORGANIZER – Real Estate Income**

**U.S. REAL ESTATE SOLD**

*(If we previously prepared a return for you, please provide information on changes or additions since the last tax return was prepared.)*

1. Type of Property (i.e. home/condo) \_\_\_\_\_ Date Purchased \_\_\_\_\_
2. The property is owned:  Solely by you  Jointly with your spouse  Other: \_\_\_\_\_
3. Property Address \_\_\_\_\_
4. Cost (US\$) \_\_\_\_\_
5. Was the property purchased:  Furnished  Unfurnished
6. If purchased furnished, what is a reasonable portion of the purchase price to allocate to the value of the furnishing? \_\_\_\_\_
7. Subsequent property improvements and furnishings purchased:

Description	Date	Cost CDNS	Cost US\$

8. Was the property sold:  Furnished  Unfurnished
9. Date sold \_\_\_\_\_ Selling Price \_\_\_\_\_
10. Please attach a copy of the Sales Contract as well as the Settlement Statements (Statements of Adjustments) for both the purchase and sale of the property.
11. Please attached a copy of the IRS Form 8288-A, to obtain credit for any withholding tax paid to the IRS.

**U.S. REAL ESTATE RENTALS**

For each U.S. property you received rental income from during the year, provide the following:

1. If you purchased the property during the year, or if this is the first year Taylor Leibow is preparing your tax return, please answer questions 1 to 7 under the “U.S. Real Estate Sold” section above. *(Otherwise, please skip to question 2)*
2. If your property was rented in the prior year, please provide a copy of your prior year US 1040NR, US Non-resident Alien Income Tax Return and any state income tax return filed *(if not prepared by Taylor Leibow)*.
3. Number of days during the year the property was:
  - a) Rented \_\_\_\_\_ b) Used personally \_\_\_\_\_ c) Vacant \_\_\_\_\_
  - (Total of (a), (b) and (c) should be 365 days)
  - During the “vacant” days, was the property offered for rent?  Yes  No
4. Rental income received (US\$) \_\_\_\_\_

**HAMILTON OFFICE**

7th Floor – 105 Main St E Phone: 905-523-0000  
Hamilton, ON L8N 1G6 Fax: 905-523-4681

**BURLINGTON OFFICE**

103 – 3410 South Service Rd Phone: 905-637-9959  
Burlington, ON L7N 3T2 Fax: 905-637-3195

**1040NR NON-RESIDENT TAX RETURN ORGANIZER – Real Estate Income**

5. Expenses incurred in year (list below or attach schedule) (US\$)

Description	Amount (US\$)	Description	Amount (US\$)
Advertising		Property taxes	
Cleaning & Maint.		Repairs	
Commissions		Sales tax	
Insurance		Utilities	
Interest		Other (describe)	
Legal Fees			

6. Please provide any Form 1042-S tax slips received to support any taxes withhold on rental income.

**OTHER U.S. INCOME**

1. Did you receive any other income from U.S. sources other than real estate income?

Yes  No

If yes, please describe, including payor and amount \_\_\_\_\_

2. Please include a copy of any U.S. source income slips received during the year.

If you have not answered all questions & supplied all documents requested on this organizer, please explain, otherwise your tax return may be delayed and/or additional fees may be incurred because of the extra time required. Also, please provide below any additional notes to assist us in preparing your return.

---

---

---

---

---

---

---

---

*The information disclosed above is accurate and complete to the best of my knowledge.*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**HAMILTON OFFICE**

7th Floor – 105 Main St E Phone: 905-523-0000  
Hamilton, ON L8N 1G6 Fax: 905-523-4681

**BURLINGTON OFFICE**

103 – 3410 South Service Rd Phone: 905-637-9959  
Burlington, ON L7N 3T2 Fax: 905-637-3195