

1040NR NON-RESIDENT TAX RETURN ORGANIZER - Wages

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

FOR CALENDAR YEAR ENDED _____ **CURRENT DATE** _____

1. Name: _____
2. Phone: _____ Cell Work Home
3. Email: _____
4. Address: _____
5. Do you have a physical residence (rent or own) available to you in the US? If so, provide the address and period available for use during the year.

6. U.S. taxpayer identification number, if any _____
7. Birth Date _____
8. Marital Status: Single/Common-law Married Widow(er) with Dependent Child
9. Your occupation _____
10. Countries of citizenship _____ , _____
Country of Birth _____
Were either of your parents U.S. citizens? _____
11. Have you ever abandoned a green card, or relinquished U.S. citizenship? Yes No
12. 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:

13. 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

14. Total Number of days present in the U.S. during: 2023 _____ 2022 _____ 2021 _____
(Include any days you were physically present in the U.S. for both personal or business purposes, including partial days)

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

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15. For each employer, what is the total number of days spent working physically in the U.S. and Canada during 2023?

Employer:	Days Working in US	Days Working in Canada	Total Days Worked During 2023

16. Have you ever filed a U.S. income tax return? Yes No

If yes, latest Year _____ Form # _____

17. If you filed a 2022 state income tax return, did you receive a refund of state income tax?

Yes No

If yes, amount of refund: _____

18. Did you receive any income from U.S. sources other than US source wages? Yes No

If yes, please describe, including payor and amount _____

19. Which state(s) did you work in during the year? _____

20. With respect to any U.S. Individual Retirement Arrangement (“IRA”) or 401(k) accounts, did you make any contributions, rollovers, or withdrawals during the year? Yes No

If yes, please provide details.

Please provide the following:

- ✓ If you filed a US 1040NR, US Non-resident Alien Income Tax Return or state income tax return in the prior year which was not prepared by Taylor Leibow, please provide a copy.
- ✓ Correspondence from the IRS or state regarding your prior year return.
- ✓ A copy of any U.S. source income slips received during the year (i.e. W2, 1042-S, 1099s, etc.).
- ✓ 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 account.

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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 _____



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