



2023 Global Tax Services Client Information

To help us with providing you a quote, please answer all the questions and provide any pertinent documentation.

Please Include a clean and clear color copy of your passport with this document

1. Name _____ Phones: Home (US) _____ (Non U.S.) _____
Maiden Name (I applicable) _____
2. Address _____
3. Contact Information: Cell _____ Office _____
Fax _____ Email _____
4. U.S. Taxpayer Identification number, if any. Please do **not** give a **non-U.S.** number _____
5. Birth Date _____ [] Single [] Married/Common Law [] Separated (by decree) [] Separated (not by decree)
6. Spouse Name _____ Birth Date _____
7. Country of citizenship _____ Citizenship of Spouse _____ Country of Birth _____
8. Dates you entered and left the U.S. during the above calendar year (i.e. the year for which your return is being prepared)

9. Please provide the following:
Number of days you were in the U.S. in 2022 _____
Number of days you were in the U.S. in 2021 _____
Number of days you were in the U.S. in 2020 _____
10. Have you ever filed a U.S. income tax return? [] Yes [] No
If Yes give: year(s) _____ From Number _____ Where sent _____
11. Do you (or spouse) have any other assets held in the U.S. and/or other sources of U.S. income? [] Yes [] No
If Yes, please list and explain:

12. If you own real estate in the U.S., did you sell any? [] Yes [] No If Yes, when you sold _____
13. Do you have a U.S. bank account? [] Yes [] No If No, do you intend to open one? [] Yes [] No

**** Please note that we may have further questions based on your answers. ****