



WESTGATE CENTER
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TAX QUESTIONNAIRE
FOR NON-RESIDENT INDIVIDUALS
TAX YEAR 2020

PLEASE PROVIDE PAGES 2 AND 3 INDIVIDUALLY FOR EACH OWNER!

PLEASE COMPLETE PAGE 2 AND 3 ENTIRELY AND DO NOT OMIT ANY QUESTIONS! WE WILL NEED ALL REQUESTED INFORMATION TO BE ABLE TO PREPARE YOUR TAX RETURN!

Name: _____

Date of birth: _____

Foreign address (if different than last year):

Phone (please provide number under which we can reach you the best) (if different than last year):

Fax (if different from last year): _____

E-mail address: (please only one e-mail address and only, if you check it regularly)

US address (if different from last year):

US phone (if different from last year): _____

US fax (if different from last year): _____

Which is the best way to contact you?

- Foreign phone
- US phone
- E-mail

Marital status:

- Single, divorced, widowed
- Married

Do you have a US Visa?

- Yes No

If yes, please send us a copy if you haven't provided it to us in previous years or if you have received a new visa.

Have you applied for or received a Greencard in 2020 (Not played the lottery only)?

- Yes No

If so, when? _____

Do you have an estate plan for your Florida assets?

- Yes No

How many days did you spend in the US during the following years?

2018: _____ 2019: _____

Actual travel dates 2020, entering and leaving the US:

Have you paid vendors in 2020, for whom 1099-Misc forms have to be prepared and submitted to the IRS?

- Yes No

Have you prepared and filed all necessary 1099-Misc forms with the IRS?

- Yes No

If so, please send us a copy for our files.

US Income and Expenses

1. Rental Income and Expenses:

	Property # 1	Property # 2	Property # 3
Address			
Income:			
Please provide name, address and phone number of the person who provided rental services (real estate agent)			
Please provide name, address and phone number of your property management company			
Expenses:			
• Advertising			
• Travel			
• Cleaning & maintenance fees			
• Association fees			
• Pool Service			
• Lawn service			
• Pest Control			
• Security alarm service			
• Miscellaneous			
• Commissions			
• Insurance			
• Legal and professional fees			
• Management fees			
• Licenses and other fees			

• Mortgage interest; please send mortgage interest statement from bank			
• Other interest			
• Repairs			
• Purchases of Furniture and Equipment etc			
• Supplies, office supplies			
• Property tax			
• Utilities			
• Telephone, Internet, TV			
• Sales- and Tourist-Tax			
• Number of days rented:			
• Number of days for personal use:			
• Number of days of rent-free use by family members, friends etc.?			

2. Interest income: _____
Please provide statements from banks)

3. Other US income: _____
Please provide supporting documentation

Improvements and new Purchases:

(Furniture, Appliances, new flooring, draperies, big repairs, pool addition, new roof, new A/C etc.)

Please do NOT enter information that you reported on pages 4&5 here again!

Date of Purchase	Description	Amount

Have you sold US real estate in 2020?

- Yes
- No

If so, please send us:

- The settlement statement of the sale of the property and the settlement statement of the purchase of the property (if you have not supplied these to us yet)
- A copy of form 8288-A that you should have received from the IRS or the Title Company at closing.
US Bank Account Information for potential Tax Refund / Payment:

Name of US Bank: _____

Account Number: _____

Routing Number: _____

Please send us a „Void Check“ or a copy of a check for the above bank account!

Did you buy US real estate in 2020?

- Yes No

If so, please send us:

- The settlement statement of the purchase of the property and the non-foreign affidavit or form W-9 that the seller signed at the closing (if you have not supplied these to us yet)

Would you like to complete and submit this form via Internet next year?

- Yes No