



WESTGATE CENTER
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**TAX QUESTIONNAIRE
FOR NON-RESIDENT INDIVIDUALS
TAX YEAR 2018**

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 won the Greencard in the Lottery or applied for a Greencard in 2018?**

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?

2016: _____ 2017: _____

Actual travel dates 2018, entering and leaving the US:

Have you paid vendors in 2018, 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. Interest income: _____

Please provide statements from banks)

2. Other US income: _____

Please provide supporting documentation

Have you sold US real estate in 2018?

- 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!

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

- Yes No