

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

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: 2024 _____ 2023 _____ 2022 _____
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

202 – 3310 South Service Rd Phone: 905-523-0000
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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 CDN\$	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\$) _____

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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

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