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1705 S Fort Hood Street Ste. 101, Killeen, TX 76542

ALL IN ONE TAX SERVICES

Tax Year: _____

Katie Grant

Attention Contractors!

So that I may more expeditiously process your tax return, please provide the following pertinent information. You can return this form, and any supporting documentation (including your W-2s) either via snail mail, fax (I use secure efax), or as a scanned attachment via email (when possible, please convert to PDF format before sending as an attachment, and when emailing documents please put in the Subject line: "(tax year) Overseas documents for (your name)").
Need additional help or have questions? You may best contact me via email (see bottom of document), I do my best to respond within 24-48 hours of receiving any correspondence. – I look forward to working with you!

*** Please provide a copy of your 2015 Tax Return if we *didn't* prepare your return last year.**

PERSONAL INFO:

Filer's Full Name: _____ SSN: _____ DOB: _____
Home address: _____ Apt: _____ City: _____ State: _____ Zip: _____

Is this your tax home? Yes/no

If yes, when established? (date): _____

Home Phone: _____ Work Phone: _____ Alternate Phone: _____

Email address: _____

Date moved to current address: _____

If **moved** in the past 12 months:

Previous address: _____ Apt: _____ City: _____ State: _____ Zip: _____

Date moved to Previous address: _____

Foreign Info (if you fall under Residency or Physical Presence status):

Foreign address: _____

Foreign City/Town/Post Office: _____ For. State: _____ For. Zip: _____

Foreign Country: _____

OCCUPATION: _____

COUNTRY of Foreign Assignment: _____

EMPLOYER INFO:

Employer Name: _____

- US Entity
- Foreign Entity
- Foreign affiliate US of Entity
- Self
- Other (specify): _____

US info (if any):

Emp. US Address: _____

Emp. US City: _____ Emp. State: _____ Emp. Zip: _____

Office Phone: _____ Alternate Phone: _____

Foreign info (if any):

Emp. Foreign address: _____

Emp. Foreign City/Town/Post Office: _____ Emp. For. State: _____

For. Zip: _____

Foreign Country: _____

GENERAL

1. Have you ever filed the form 2555 (Foreign Earned Income Exclusion) before? Yes/No
If so, what was the last year filed? _____
2. Have you ever had your exclusion revoked/denied? _____
If so, what year? _____
Reason? _____
3. Did you maintain a separate foreign household? Yes/No
If Yes: City _____ State _____
What date did this start? _____
4. Is this the year of expatriation? Yes/No
If Yes, have you submitted required statement to foreign authorities? Yes/No
5. To What Country? _____
Date: _____
6. Did your employer provide living quarters in Foreign Country? Yes/No
 - a. Type (ie. Military Barracks, Hotel, etc.)
7. Did your employer provide or reimburse for meals and/lodging or vehicle? Yes/No
 - a. Meals \$: _____
 - b. Lodging \$: _____
 - c. Vehicle \$: _____

TRAVEL

Original deployment date: _____

Foreign Travel (if any, in the tax year):

Date left Country 1: _____

To what Country? _____ Returned: _____

Date left Country 2: _____

To what Country? _____ Returned: _____

U.S. Travel (in the tax year):

RR date 1: _____ Returned _____

No. of Full Days Present in US: _____

RR date 2: _____ Returned _____

No. of Full Days Present in US: _____

RR date 3: _____ Returned _____

No. of Full Days Present in US: _____

RR date 4 _____ Returned _____

No. of Full Days Present in US: _____

Or... PHYSIALLY PRESENT IN COUNTRY ALL YEAR (circle of applicable) YES

Any additional information you think would be helpful in completing your exclusion adjustment:

Again, I look forward to working with you! And as always, advice is FREE – so let me know if you have any questions!

Secure email: kgrant@allinonetaxservices.com