

**1040NR TAX RETURN ORGANIZER (REAL ESTATE INCOME)**

**FOR CALENDAR YEAR** \_\_\_\_\_ **CURRENT DATE** \_\_\_\_\_

To Avoid Delay with your return please answer all questions and provide copies of necessary documentation

1. Name \_\_\_\_\_ Phone: Home (US): \_\_\_\_\_  
Home (Non-US): \_\_\_\_\_
2. Address \_\_\_\_\_ Cell: \_\_\_\_\_ Office: \_\_\_\_\_  
\_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_
3. U.S. Taxpayer Identification Number, if any. Please do not give us your Canadian SIN:  
\_\_\_\_\_
4. Birth Date \_\_\_\_\_ Marital Status: ( ) Single ( ) Married
5. Dependent Children: Name \_\_\_\_\_ Date of Child's Birth: \_\_\_\_\_  
Child's U.S. ITIN (if any) \_\_\_\_\_  
  
Dependent Children: Name \_\_\_\_\_ Date of Child's Birth: \_\_\_\_\_  
Child's U.S. ITIN (if any) \_\_\_\_\_
6. Country of Citizenship \_\_\_\_\_ Country of Birth \_\_\_\_\_
7. Did you have a "green card" during the year? ( ) Yes ( ) No If yes, date you acquired green card  
\_\_\_\_\_  
If no, have you applied for a green card? ( ) Yes ( ) No. If yes, when did you apply for a green card?  
\_\_\_\_\_  
Have you abandoned a green card, or relinquished US citizenship since February 2, 1995? ( ) Yes ( ) No  
Do you have any other US visa? ( ) Yes ( ) No If Yes, type of Visa & Number (if any)  
\_\_\_\_\_
8. Country issuing your Passport \_\_\_\_\_ Country of Residence \_\_\_\_\_
9. Were you ever a U.S. citizen or U.S. resident? ( ) Yes ( ) No. Was one of your parents ever a U.S. citizen? ( ) Yes ( ) No
10. Purpose of your visit to the U.S. \_\_\_\_\_
11. Date you entered the U.S. in the 2008 tax year \_\_\_\_\_
12. Please provide the number of days that you were in the U.S. for the following years:
  - 2008 \_\_\_\_\_ days
  - 2007 \_\_\_\_\_ days
  - 2006 \_\_\_\_\_ days
13. Have you ever filed a U.S. income tax return ( ) Yes ( ) No

If yes, give: Year (s) \_\_\_\_\_ Form Number \_\_\_\_\_ Where filed \_\_\_\_\_

14. Type of Property (i.e. home/condo) \_\_\_\_\_ Date of Purchase \_\_\_\_\_

15. The property is owned: ( ) Solely by you ( ) Jointly with your spouse ( ) Other

16. Property Address: \_\_\_\_\_

17. Cost \_\_\_\_\_ Was the property purchased, furnished or unfurnished? ( ) Furn ( ) Unfurn

18. If purchased furnished, what is a reasonable portion of the purchase price to allocate to the value of the furnishings? \_\_\_\_\_

19. Furnishings Purchased: Description \_\_\_\_\_ Date \_\_\_\_\_ Amount(US\$) \_\_\_\_\_

**U.S. RENTAL INCOME & EXPENSES**  
**(PLEASE ENTER TOTAL FIGURES ON ONE SPOUSES'S ORGANIZER ONLY)**

20. Number of days during the year the property was:

a) Leased \_\_\_\_\_ b) Used personally \_\_\_\_\_ c) Vacant \_\_\_\_\_

21. During the "vacant" days, was the property offered for rent? ( ) Yes ( ) No

22. Rental income received for the 2008 tax year (US\$) \_\_\_\_\_

23. Expenses from 1/1/08 – 12/31/08 in US\$

Advertising		Legal Fees		Utilities	
Cleaning & Maint.		Tax Return Fees		Other:	
Commissions		Repairs			
Insurance		Property Taxes			
Interest		Travel			

**U.S. RENTAL ESTATE SOLD**  
**(PLEASE ENTER TOTAL FIGURES ON ONE SPOUSES'S ORGANIZER ONLY)**

24. Did you sell U.S. real estate during the year? ( ) Yes ( ) No If yes, please answer the following:

25. Was the property sold furnished or unfurnished? ( ) Furn. ( ) Unfurn.

26. Property address \_\_\_\_\_

27. Date Sold \_\_\_\_\_ Selling price \_\_\_\_\_

28. It was owned ( ) Solely by you ( ) Jointly with spouse ( ) Other

29. Please provide amounts for all expenses paid during the current year up to the date of sale. Please provide on the table on line 23 above or on a separate piece of paper.

30. Please attach a copy of the Sales Contract, and also the Settlement Statements for both the purchase and sale of the property and also IRS Form 8288-A, if any.

***OTHER U.S. INCOME***

31. Did you receive any other income from U.S. sources other than real estate rental income? ( ) Yes ( ) No

***OTHER***

32. Provide details and amounts of any taxes withheld or paid in the U.S. during the year. Also provide details of charitable contributions, casualty or theft losses in the U.S. and any business expenses.

33. **Have you answered all questions & supplied all documents requested on this questionnaire?**

( ) Yes ( ) No **If No, please explain, otherwise your tax return may be delayed and/or the fee may be increased because of the extra time required.**

Signed: \_\_\_\_\_

Please return to:  
Terry F. Ritchie, EA  
116 Mt. Apex Green SE  
Calgary, AB T2Z 2V5  
403-257-4488  
terryritchie@mac.com

**Please include a \$300 retainer with this organizer**