2018 INDIVIDUAL INCOME TAX ORGANIZER (SHORT FORM FOR RETURNING CLIENTS)

Palazzo & Company LLC
CPAs and Professional Advisors
Global Knowledge. Local Trust.

PALAZZO & COMPANY, LLC CPAs AND PROFESSIONAL ADVISORS
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CLIENT INFORMATION

Taxpayer Name		Social Security Number	
Spouse Name		Social Security Number	
Current Mailing Address		Marital Status as of 12/31/18 as of 12/31/2014	
Apartment Number			
City		Work Email	
State		Personal Email	
Zip Code		Phone Number	

FOREIGN INFORMATION

Taxpayer Street Address Overseas	
City	
Postal Code or APO	
Country	
Name of Employer	
First full day overseas?	

TRAVEL INFORMATION - TRIPS TO USA OR US POSSESSION OR TERRITORY (SEND FLIGHT ITINERARIES)

Please enter all travel for 2018 as well as travel for 2019 known to date and estimated.
Use MM/DD/YY format for all dates entered.

Date left foreign country	Date arrived in USA	Date left USA	Date arrived in foreign country

If you have demobed, enter date returned to US:

TAX RETURN QUESTIONS

	YES	NO
1) Did your marital status change during the year?		
2) Were there any changes in dependents?		
3) Did your resident state change during the year?		
4) Did you, your spouse, and your dependents have health insurance for the entire year of 2018? (send 1095-A, 1095-B, and/or 1095-C)		
5) Did you have any investment income, such as interest, dividends, stock sales, royalties, etc? *(provide year-end statements)*		
6) Did you have any other income, such as income from retirement distributions, self- employment, rental properties, unemployment compensation, alimony, gambling winnings, jury duty pay, or state tax refunds? *(provide year-end statements)*		
7) Did you have any debt cancelled or was your home foreclosed?		
8) Did you purchase, refinance or sell your principal home, second home, or rental property? *(send closing docs)*		
9) Did you own any foreign assets, such as bank accounts, retirement accounts, investments, etc?		
10) Did you make any contributions to a retirement account other than one sponsored by your employer?		
11) Did you have any higher education expenses or pay any student loan interest?		
12) Did you have any itemizable deductible expenses, such as home mortgage interest, property taxes, medical expenses, car tags, or charitable contributions?		
13) Did you have any dependent care expenses?		

IF YOU ANSWERED "YES" TO ANY OF THE QUESTIONS ABOVE, IT IS IN YOUR BEST INTEREST TO COMPLETE A FULL CLIENT TAX ORGANIZER. YOU CAN DOWNLOAD THE ORGANIZER AT
http://palazzotax.com/forms

DIRECT DEPOSIT OF REFUND / ELECTRONIC PAYMENT - CURRENT YEAR ONLY

Do you want your refund directly deposited?	
Do you want your tax balance directly drafted?	
Bank Name	
Routing Number (9 Digits)	
Account Number	
Type of Account-Checking or Savings	

Basic Expat Fee is $500 and Basic U.S. Return (no foreign income) is $350. These fees include Federal and single State tax return preparation, efiling, federal extensions (state upon request) and limited year-round planning and support.

Additional Fees:

Schedule C, E, or F (per form) **$150**
Additional State or Local Tax Returns - **$75**
Second Overseas Presence Test (Form 2555) **$100**
Separate Filing of Tax Returns for Taxpayer and Spouse **$150**
Foreign Bank Account Reporting (Form 114) **$50**
Foreign Asset Reporting (Form 8938) **$150**
Foreign Corporation or Partnership (Forms 5471 or 8865) **$200**
Foreign Trust Reporting (Form 3520-A) **$250**

PAY ONLINE NOW

Depreciation Issues (Form 3115) **$100**
Significant Stock Transactions **$85/hr**
Transcript Fee or Power of Attorney Form **$45**
Fee to Mail Returns **$20**
IRS/State Issues **$125/hr**
Expedite Fee **$150**

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Pay online now - it's secure, fast and easy - or call 1-866-272-9224

2017 INDIVIDUAL INCOME TAX ORGANIZER (SHORT FORM FOR RETURNING CLIENTS)

COMMENTS OR QUESTIONS - TYPE IN SPACE PROVIDED

PRIVACY NOTICE

THIRD PARTY SERVICE PROVIDER - We DO NOT use third-party service providers. Confidentiality of your information is maintained under agreements that meet professional and government guidelines, as well as our privacy policy.

PALAZZO & COMPANY, LLC PRIVACY POLICY - Like all providers of personal financial services, we are now required by law to inform our clients of our policies regarding privacy of client information. We have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

TYPES OF NONPUBLIC PERSONAL INFORMATION WE COLLECT - We collect nonpublic personal information about you that is provided to us by you or obtained by us from third parties with your authorization.

PARTIES TO WHOM WE DISCLOSE INFORMATION - For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees or to unrelated third parties who need to know that information to assist us in providing services to you to complete your tax return. In all such situations, we stress the confidential nature of information being shared.

PROTECTING THE CONFIDENTIALITY AND SECURITY OF CURRENT AND FORMER CLIENTS' INFORMATION - We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with professional standards.

Please call if you have any questions because your privacy, our professional reputation, and the ability to provide you with quality professional Expatriate tax planning and preparation services are very important to us.