

Tax Organizer—Expatriate

Name: _____ Tax Year: _____
Foreign address (if different from mailing address): _____

PART 1—Employment Information

Employer's name: _____
Employer's U.S. address: _____
Employer's foreign address: _____
Employer is: A foreign entity A U.S. company Self A foreign affiliate Other

PART 2—Historical Information

Have you filed Form 2555 at any time after 1981? Yes No
If Yes: Year filed: _____
Year revoked, if any: _____
Country of citizenship: _____ If not U.S. citizen, date permanent residency granted: _____
Tax home(s) during year and date(s) established: _____

PART 3—Assignment Information

Date moved to location of assignment: _____ Date moved from location of assignment: _____
Type of living quarters: Purchased house Rented house or apartment Rented room Quarters furnished by employer Other: _____
Family members who resided with you (if any): _____
Contractual terms or other conditions relating to length of assignment: _____
Assignment visa type: _____
Visa expiration date: _____ Renewable: Yes No
If home maintained in U.S. while living abroad:
Address: _____
Occupants (provide name and relationship to taxpayer): _____
Covered by the North Atlantic Treaty Status of Forces Agreement (SOFA): Yes No
Required to pay income tax in the country of assignment: Yes No
If Yes, have you submitted statement to the foreign authorities that you are not resident in the foreign country: Yes No

PART 4—Travel Information

Country	Date Arrived	Date Departed	Days Worked		Total Days	
			U.S.	Non-U.S.	U.S.	Non-U.S.
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
Total Days			_____	_____	_____	_____

Tax Organizer—Expatriate (Continued)

PART 5—Housing Information

	You Paid	Employer Paid or Reimbursed	Total
House or apartment rent (do not include hypothetical housing retained by employer)	\$ _____	\$ _____	\$ _____
FMV of employer-provided housing	_____	_____	_____
Repairs	_____	_____	_____
Utilities (not including telephone)	_____	_____	_____
Real and personal property insurance	_____	_____	_____
Nondeductible occupancy taxes	_____	_____	_____
Nonrefundable fee for securing lease	_____	_____	_____
Furniture/appliance rental	_____	_____	_____
Residential parking	_____	_____	_____
Lodging portion of temporary living expense upon move	_____	_____	_____
Total housing costs	_____	_____	_____

PART 6—Compensation Information

Normal:

Base salary	\$ _____		
Pre-tax deductions	(_____)		
401(k) elective deferrals	(_____)		
Commissions	_____	Year related to _____	
Incentive bonus	_____	Year related to _____	
Group-term life insurance	_____		
Stock options	_____	Granted _____	Exercised _____
Type _____	_____	Grant price _____	Exercise price _____
Other: _____	_____	Year related to _____	

Assignment-related:

Housing reimbursement	_____		
Employer-provided housing	_____		
Utilities	_____		
Cost of living allowance	_____		
Education	_____		
Family allowance	_____		
Home leave	_____		
Automobile	_____		
Moving	_____	Date of move _____	
Foreign taxes—current year	_____		
Foreign taxes—future/prior year	_____	Year _____	
U.S. taxes—current year	_____		
U.S. taxes—future/prior year	_____	Year _____	
Storage	_____		
Hypothetical tax withheld by employer	(_____)		
Hypothetical housing withheld by employer	(_____)		
Other: _____	_____	Year related to _____	

Total compensation _____