



# Savransky Partners LLC

International Accounting and Tax Consulting

## Initial Client Interview

Instructions: Please fill out this form and we will send you a quote.

Name

Taxpayer	
Spouse	

E-mail Address

Phone Number

Country of Residence

Address	Dates of birth	Social Security Number

Date you became a resident of this country:

U.S. Citizen       Yes       No      Taxpayer

Yes       No      Spouse

Number of dependents who are US citizens: \_\_\_\_\_

Number of US dependents under the age of 17: \_\_\_\_\_

1. Did you receive passive income, such as dividends, interest and capital gains?       Yes       No

2. Are you self-employed?       Yes       No

3. Did you receive income from rental and real estate property?       Yes       No

4. Do you have an interest in a US partnership, LLC or S Corporation?       Yes       No

5. Did you receive income from royalties?       Yes       No

6. Please answer "yes" if you had any of these expenses during the years for which we will be filing returns: charitable donations, state taxes, mortgage interest, property taxes and medical expenses.       Yes       No

7. Did you receive salaries from a foreign employer?  Yes  No

If the answer is "yes," please enter the number of employers from whom you received salaries: \_\_\_\_\_

8. Did you give a gift of more than \$13,000 to one or more people?  Yes  No

9. Did you have any debts cancelled, forgiven, or refinanced?  Yes  No

10. Did you pay interest on a student loan for yourself, your spouse, or your dependent to attend classes beyond highschool?  Yes  No

11. Did you pay expenses for yourself, your spouse, or your dependent to attend classes beyond highschool?  Yes  No

12. Did you have any children under the age of 19 or 19 to 23 year old students with unearned income of more than \$950?  Yes  No

13. Did you sell your primary residence or any other rental property during the tax year/s for which we will be filing returns?  Yes  No

14. Do you have an interest in or a signature or other authority over a financial account in a foreign country?  Yes  No

If you answered "yes," please enter the total value of all your foreign accounts combined. "Foreign accounts" include foreign checking and savings accounts, brokerage accounts, life insurance, pension, Israeli keren hishtalmut, and Israeli bituach menahalim. \_\_\_\_\_

Please enter the number of accounts: \_\_\_\_\_

15. During the years for which we will be filing returns, did you take a distribution from your keren hishtalmut account?  Yes  No

16. Do you own at least 10% of the shares

in a foreign corporation?

Yes  No

17. Are you a partner in a foreign partnership?

Yes  No

18. Are you a beneficiary or you did you receive distributions from a foreign trust?

Yes  No

19. Did you receive a gift from a foreign person in excess of \$100,000 during any of the years for which we will be filing returns?

Yes  No

20. Do you own karnot neemanut in Israel or mutual funds other foreign countries?

Yes  No

21. Did you receive any correspondence from the IRS or the State Department of Taxation?

Yes  No

22. Please list the last year for which you filed US tax returns:

\_\_\_\_\_