

INTAKE – Foreign Income Statement

Complete and return this form if you own foreign assets and/or foreign earnings.

Information provided below will be used to complete IRS Form(s) 1116, 2555, and/or 8938.

PLEASE COMPLETE IN U.S. CURRENCY

Taxpayer Name: _____ **Tax Year:** _____

Address Information

Foreign Address: _____ Date established: _____
City/State/Providence: _____ Country: _____
Postal Code: _____ Country Code: _____
Kind of foreign living arrangements: ☐ Rented ☐ Purchased ☐ Housing Provided by Employer

Do you have a US based address? ☐ Yes ☐ No
U.S. Address: _____ Date established: _____
City/State/Zip: _____

Foreign Employment Information

☐ Retired ☐ Unemployed ☐ Employed (complete this section)
Employer Name: _____ Occupation: _____
Is employer a U.S. based company? ☐ Yes ☐ No
Address _____
City/State/Providence: _____ Country: _____
Postal Code: _____ Country Code: _____

Were you present in the US or its territories during the tax year? ☐ Yes ☐ No
Date Arrived in U.S. _____ Date left U.S. _____ Income earned in U.S. for business _____

***Foreign Income Received**

Foreign Income _____ Income Converted to U.S. \$ _____
Foreign Tax Paid _____ Tax Converted to U.S. \$ _____
Exchange Rate Used _____ Postal Code: _____ Country Code: _____

Did you receive any noncash foreign income? (meals, property, vehicle, etc) _____

***Foreign Deposit and Custodial Accounts**

(attach separate statement if more space is needed)

Account Name: _____ Type of Account: ☐ Deposit or ☐ Custodial
Maximum value of account during tax year \$ _____

Account Name: _____ Type of Account: ☐ Deposit or ☐ Custodial
Maximum value of account during tax year \$ _____

Account Name: _____ Type of Account: ☐ Deposit or ☐ Custodial
Maximum value of account during tax year \$ _____

Were any foreign deposit or custodial accounts opened or closed during the tax year? ☐ Yes ☐ No.

Please do not hesitate to contact us if you have any questions.

Oliver & Associates, LLC PO Box 721430 Oklahoma City, OK 73172 Fax 405-724-5005
Tonya Oliver 405-590-5733 Tonya@Oliver-Associates.net www.Oliver-Associates.net

Other Foreign Assets(attach separate statement if more space is needed)*

Asset Description: _____

Maximum value of asset during tax year:

____ \$0-\$50,000 ____ \$50,000-\$100,000 ____ \$100,001-\$150,000
 ____ \$150,001-\$200,000 If more than \$200,000, list value _____

Asset Description: _____

Maximum value of asset during tax year:

____ \$0-\$50,000 ____ \$50,000-\$100,000 ____ \$100,001-\$150,000
 ____ \$150,001-\$200,000 If more than \$200,000, list value _____

Asset Description: _____

Maximum value of asset during tax year:

____ \$0-\$50,000 ____ \$50,000-\$100,000 ____ \$100,001-\$150,000
 ____ \$150,001-\$200,000 If more than \$200,000, list value _____

Asset Description: _____

Maximum value of asset during tax year:

____ \$0-\$50,000 ____ \$50,000-\$100,000 ____ \$100,001-\$150,000
 ____ \$150,001-\$200,000 If more than \$200,000, list value _____

Asset Description: _____

Maximum value of asset during tax year:

____ \$0-\$50,000 ____ \$50,000-\$100,000 ____ \$100,001-\$150,000
 ____ \$150,001-\$200,000 If more than \$200,000, list value _____

Were any foreign assets acquired or sold during the tax year? ____ Yes ____ No

***Other Foreign Income**

For each category, please report total amount received during the tax year

Interest _____ Dividends: _____

Royalties: _____ Other Income: _____

COMMENTS/NOTES *(please list any changes or additional information that may pertain to the preparation of the tax return)*

*** REQUIRED ***

I certify that I have listed all income, all asset, and required information, and I have documentation to prove the figures entered on this worksheet for preparation of my income tax return.

Name (Print): _____ Signature: _____

Date: _____

Please do not hesitate to contact us if you have any questions.

Oliver & Associates, LLC PO Box 721430 Oklahoma City, OK 73172 Fax 405-724-5005
 Tonya Oliver 405-590-5733 Tonya@Oliver-Associates.net www.Oliver-Associates.net