2019 Tax Questionnaire

Please fill out the attached questionnaire and send it back with the required documents listed on page two to [info@masamerica.co.il](mailto:info@masamerica.co.il). One of our representatives will contact you in order to assist in completing your Tax Return

|  |  |  |  |
| --- | --- | --- | --- |
| First Name \* | Last name \* | | Social Security #\* |
|  |  | |  |
| Home Address ( Street, City, Zip code) | | | |
|  | | | |
| DOB (MM/DD/YY) | Marital status | | Number of Children |
|  | Widowed/ Divorced/ Married / Single | |  |
| Date of Aliyah (MM/DD/YY) | Dates in the US during 2019 | | Reason for Visit |
|  |  | | Work/Pleasure |
| Occupation | Company Name | | Role/Position |
|  |  | |  |
| Occupational Status | | Did you file a US tax return in 2018? If yes, please provide us with a copy. | |
| Self-employed /Employee / Retired | |  | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Spouse (if not a citizen please fill in the name only)** | | | |
| First Name\* | Last name \* | | Social Security #\* |
|  |  | |  |
| Date of Aliyah (MM/DD/YY) | Dates in the US during 2019 | | Reason for Visit |
|  |  | | Work/Pleasure |
| Role / Position | Company Name | | Occupation |
|  |  | |  |
| Occupational status | |  | |
| Self-employed / Employee / Retired | |  | |

|  |  |  |
| --- | --- | --- |
| **Children under 18 years old with US Citizenship (each child separately)** | | |
| Child Name\* | Child Name\* | Child Name\* |
|  |  |  |
| DOB (MM/DD/YY) | DOB (MM/DD/YY) | DOB (MM/DD/YY) |
|  |  |  |
| Social Security # | Social Security # | Social Security # |
|  |  |  |

\* Please make sure that all the names are written exactly as they appear on the social security cards

Please provide the following documents (you can scan and email us)

* Copy of US Passport
* Copy of Israeli ID (Teudat Zehut)
* Copy of Social Security Card

**For tax year 201**9

* Employee - Form 106 from your employer
* Self-employed - Copy of your complete Israeli tax return (Form 1301) including doch revach v’hefsed for each year
* Form 867 (Ishur Nukui Mas) from each bank where you have accounts. If you have multiple accounts in different banks, please attach a Form 867 for each account
* If you have an investment account in the US please provide all 1099 Forms
* If you received unemployment or Maternity Pay from Bituach Leumi please provide these amounts
* If you have invested in a US partnership or LLC please provide each Form K-1 from the investment
* Details of gifts/inheritance given or received in the last year (if over $10,000).
* Copy 2018 US tax return if you did not file with MasAmerica
* Income from Real Estate, please provide a separate breakdown of income and expenses for each property. Additionally, please provide the full address, purchase price and date of purchase of the property

**For the FBAR and Form 8938 please provide:**

* For every bank account (including joint account and/or power of attorney accounts) please include the ishur yitrot sof shana for 2019
* For each pension, kupat gemel or keren hishtalmut, please include the 2019 annual statement

**Where to send the documents**?

Fax – 073-769-0604

Email – [joshe@masamerica.co.il](mailto:joshe@masamerica.co.il)

Do you have any questions? Do you need help in filling out the forms? We at MasAmerica are available at any time at **073-769-0600**.