IRS Streamlined Filing Submission

**Who is this program for?**

This program is for any American Citizen or Green card holder that has never filed US taxes before or that has not filed for the last 3 years.

**What is the process?**

1. Complete the attached tax questionnaire and email it back to me.

2. Gather all of the requested information listed on the second page of the questionnaire.

|  |  |  |
| --- | --- | --- |
| 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 from 2017-2019 | Reason for Visit |
|  |  | Work/Pleasure |
| Occupation | Company Name | Role/Position |
|  |  |  |
| Occupational Status | Did you file a US tax return in the past? 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 from 2017-2019 | Reason for Visit |
|  |  | Work/Pleasure |
| Role / Position | Company Name | Occupation |
|  |  |  |
| Occupational status | DOB (MM/DD/YY) |
| 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 the past 3 tax years (2017-2019)**

* 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 $15,000)
* Copies of US tax returns for previous years – if filed
* 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 statements from the past 6 years (2014-2019) are required. Please include:**

* For every non-US bank account (including joint account and/or power of attorney accounts) please include the ishur yitrot sof shana or highest annual balance for years 2013-2018
* For each non-US pension, kupat gemel or keren hishtalmut, please include the annual statement for years 2013-2018

**Where to send the documents**?

Fax – 073-769-0604

Secure file transfer – [Click here](https://masamerica.sharefile.com/r-r1f0e5efe1eb4d62a)  to send me sensitive documents using our secure portal.

Email – joshet@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**.