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www.sdcglobalcpa.com

[Click here to upload questionnaire when complete](#)

If you are interested in a FREE, no-obligation consultation regarding your U.S. taxes, please complete the following questionnaire and upload to our website via the link above. We will contact you to arrange a time to discuss.

Consultation Request Form

How did you hear about us?						
Name						
Email:			Country of Residence			
Phone number/Skype name:			US Tax years needing to file			
GENERAL INFORMATION						
Do you have a SSN?		Yes	No	File a tax return in the country you live in?		
				Yes	No	
Your Profession						
What country is your citizenship?						
If not a US citizen, are you a green card holder?		Yes	No	Are you married?		
				Yes	No	
Is your spouse a US citizen/green card holder?		Yes	No	Does your spouse have SSN/ITIN?		
				Yes	No	
Last time you resided in the U.S.? (year)				Last year you filed a U.S. tax return		
INCOME						
Do you earn wages as an employee?		Yes	No	Are you self-employed?		
				Yes	No	
Do you earn interest or dividends?		Yes	No	Do you have any other income?		
				Yes	No	
Are you the owner, trustee, or beneficiary of any trust?		Yes	No	Estimate your annual income:		
Describe other income you have:						
ASSETS						
Do you have bank accounts outside of the US?		Yes	No	If yes, estimate the value of the accounts:		
Do you have investments (stocks, funds)?		Yes	No	If yes, estimate the value of the accounts:		
Do you have pensions outside the US?		Yes	No	If yes, estimate the value of the pensions:		
Do you have life insurance policies?		Yes	No	If yes, do they accumulate value?		
				Yes	No	
Do you own an interest in a partnership, company or other entity organized outside the US?		Yes	No	If yes, what % of the entity do you own?		
Do you have rental property?		Yes	No	If yes, what country is the property in?		
Do you own any other property or assets?		Yes	No	If so, describe here :		
Are you a signatory on an account(s) you do not own that is held outside the US? (For example, are you authorized on current account for an employer, relative, etc.)?					Yes	No