

2025 NON RESIDENT INDIVIDUAL QUESTIONNAIRE (For Non U.S. Citizens Only)

Taxpayer Name: _____

Email: _____ Phone: _____

Spouse's Name: _____

Email: _____ Phone: _____

Please review each question and check YES or NO and provide additional information as necessary:

YES | NO

1. Has your marital status changed?

If YES, please specify: _____

2. Has your dependent information changed?

If YES, please specify (name, SS#, DOB): _____

3. Has your immigration status change?

If YES, please specify (citizenship, "green card", visa): _____

4. Did you or your spouse's ITIN changed?

If YES, new ITIN: _____

5. Has your contact information changed this year? If YES, please provide us with the following:

Phone number change: _____ **Email address change:** _____

6. Has your address changed this year? If YES, please provide us with the following:

Date address change: _____ **New Address:** Street _____

7. Did you file a tax return extension last year?

8. Did you receive any stock options from any US employer? (qualified, restricted or incentive stock options). If YES, please provide supporting documents.

9. Did you or your spouse earn or receive any **other US Sourced income** in 2025 from:

a. Rental income? If YES, please fill out the attached "*Rental Spreadsheet*" per property and provide supporting documents.

b. Self-employment? If Yes, please provide support documents *and* fill out the attached "*Self-Employment Income and Expense*" spreadsheet per business (ex: 1099's, etc.)

c. Partnership, S Corporation or Corporation's in 2025? (please provide K-1's or 1099-DIV)

d. Did you or your spouse earn any Interest/Dividend/Capital Gain? If YES, please provide support.

10. Do you own any single member LLC's? If YES, please provide financial statements.

Long Island
350 MOTOR PARKWAY
STE 204
HAUPPAUGE, NY 11788

New York City
14 EAST 38TH STREET
7TH FL
NEW YORK, NY 10016

Florida
1250 E. HALLANDALE BEACH BLVD
STE 407
HALLANDALE BEACH, FL 33009

(631) 273-9532

(212) 302-7900

(754) 231-0004

- a. Did you file a NYS LLC (Form NY IT-204-LL)? If YES, please provide supporting documents.
 - b. Did the LLC receive any K-1's? If YES, please provide the supporting documents.
- 11.** Did you or your spouse receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency? If YES, amount(s) _____.
- 12.** Did you or any member of your family request an Identity Theft Protection Pin?
If YES, Name and assigned Pin Number _____.

Please mention any additional information or changes you feel may be useful in the section below.

If you are interested in scheduling a tax planning meeting, please let your respective account manager know or contact our Office Manager at info@eshelcpa.com

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