



New Client Quote Form

1635 Brooks Avenue
Rochester, NY 14624

Telephone 00.1.585.328.4990
Fax 00.1.585.328.1498

Date _____
Name _____

How Did You Find Us:

Phone #'s (Home) _____
(Please Add (Work) _____
Country Code) (Cellular) _____

Fee Quote _____
Preparer _____
For Office Use Only

Foreign Address _____

Current Country _____ (Since) _____
(Until) _____

U.S. Address _____

State of Domicile _____ (Returning) _____

Tax Return Includes:

- _____ W-2's (Indicate amount you have)
- _____ Bought a House in U.S. (Yes/No)
- _____ Bought a House in Foreign Country (Yes/No)
- _____ Sold a House in U.S. (Yes/No)
- _____ Sold a House in Foreign Country (Yes/No)
- _____ Other States (Besides Home State) with Property (Yes/No)
- _____ Other States with Investment Income (List additional States)
- _____ Who Paid for Relocation Expenses
- _____ Self-Employed (Yes/No)
- _____ Office in Home (Yes/No)
- _____ Sold Securities (Yes/No)
 - Approximately How Many
- _____ Rental Property (Yes/No)
 - How Many Properties
 - In U.S. (What State(s))
 - Foreign (What Country(ies))
 - Commercial or Residential
- _____ Unreimbursed Employee Business Expenses (Yes/No)
- _____ K-1's (Indicate amount if yes)
- _____ Interest/Dividends (Yes/No)
- _____ Pension/IRA Distributions (Yes/No)
- _____ Foreign Sales Tax (Large Purchase) (Yes/No)

Filing Status: (Please write 'Yes' in corresponding field)
(Fill in additionally required information, i.e. address)

- _____ Married Filing Joint
 - Spouse Living in U.S.
 - Spouse U.S. Address
- _____
 - Spouse Living Abroad
 - Spouse Foreign Address
- _____
 - Spouse Living with Taxpayer
- _____ Married Filing Separate
 - Head of Household
 - Number of Dependents
- _____ Single

Please return form to one of the following:	
Mail:	1635 Brooks Avenue Rochester, NY 14624 United States
E-Mail:	info@expatriatetaxonline.com

Questions/Comments:

