



Questionnaire

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Attach W-2 to the questionnaire

Tax Return for United States

Name:

Date of birth:

Tax year:

Visa type:

- J1- Work and travel
- J1 - Student
- J1- Teacher
- J1- AuPair
- F1

- Q1
- M1
- H1B
- H2B
- Other _____

Occupation:

SSN (Social security number):

2020 - The state you worked in:

Do you need federal tax return?

YES NO

Do you need state tax return?

YES NO

2021 - The state you worked in:

Do you need federal tax return?

YES NO

Do you need state tax return?

YES NO

2022 - The state you worked in:

Do you need federal tax return?

YES NO

Do you need state tax return?

YES NO

2023 - The state you worked in:

Do you need federal tax return?

YES NO

Do you need state tax return?

YES NO

Full permanent address in 2020:



Full permanent address in 2021:

Full permanent address in 2022:

Full permanent address in 2023:

Full contact address:

In order for us to calculate the highest possible refund and apply any discounts, we need to know all the information. If you don't fill them in, you could lose out on a higher refund.

Please indicate the period of time you have lived in United States:

State the period of time you have worked in United States:

Did you live in another country during the year?

YES **NO**

2020:

2021:

2022:

2023:

Have you had income from another country?

YES **NO**

Indicate what income you had and from which country:

2020:

2021:

2022:

2023:

Are you married?

YES NO

Full name of your spouse:

Birth number/date of birth of your spouse:

Date of marriage:

Worldwide income of your spouse:

| | |
|-------|-----------|
| 2020: | currency: |
| 2021: | currency: |
| 2022: | currency: |
| 2023: | currency: |

Do you have children?

YES NO

Date of birth of your children:

| | |
|----------------|----------------|
| Child (nr.) 1: | Child (nr.) 2: |
| Child (nr.) 3: | Child (nr.) 4: |

Did you have income outside of United States?

YES NO

Your income outside of United States (amount)

| | |
|---|-----------|
| 2018: Do not fill in for the year in question | currency: |
| 2019: Do not fill in for the year in question | currency: |
| 2020: | currency: |
| 2021: | currency: |
| 2022: | currency: |
| 2023: | currency: |

Have you been in the USA in other than requested year(s)?

YES NO

Write down the year(s) and number of days:

At any time during requested year(s), did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?

YES NO

Which year(s)?

Did you pay tax return preparation fees?

YES NO

How much did you pay?

2018: Do not fill in for the year in question

USD

2019: Do not fill in for the year in question

USD

2020:

USD

2021:

USD

2022:

USD

2023:

USD

Did you pay other expenses (uniform, shoes, fee for employment agency to obtain a job)?

YES NO

How much did you pay?

2018: Do not fill in for the year in question

USD

2019: Do not fill in for the year in question

USD

2020:

USD

2021:

USD

2022:

USD

2023:

USD

Dates of entering and leaving United States in the given tax year. Please enter the exact day and month when you entered and left the country.

| | |
|-------------|-------------|
| Entry date: | Leave date: |
| Entry date: | Leave date: |
| Entry date: | Leave date: |
| Entry date: | Leave date: |

Do you have Identity Protection PIN from IRS? YES NO

Your Identity Protection PIN:

Additional information:

Complete bank details for sending refund

Account holder:
IBAN:
Currency:

I declare that the information is correct. I also understand that every detail mentioned in the questionnaire can have an impact on the result of the precalculation.

I understand that Neotax commission is based on the income tax refund for a given tax year. If the foreign tax office reduces the paid tax refund by deducting any existing, known or unknown, debts towards any official authority, this reduction will not influence the calculation of the commission, which is based on tax return confirmed by tax office. More about such situation can be found on the [blog](#).

Name: _____

Date of birth: _____

Signature: _____