

TAX ORGANIZER SHORT FORM

NAME _____

PHONE NUMBER _____

SOCIAL SECURITY NUMBER _____

EMAIL ADDRESS _____

ADDRESS _____

INCOME

FOREIGN FLAGGED VESSELS _____

AMERICAN FLAGGED VESSELS _____

PLEASE PROVIDE ANY THIRD PARTY DOCUMENTATION YOU MAY HAVE RECEIVED

THESE DOCUMENTS MAY INCLUDE BUT ARE NOT LIMITED TO THE FOLLOWING:

- W-2'S wage statement (typically received when working on American flagged vessels)
- 1099-MISC income statement (typically received when working on American flagged vessels as an independent contractor or freelance crewmember)
- 1099-INT issued by your financial institution to report interest income earned
- 1099-DIV issued by your financial institution to report dividend income earned
- 1099-B issued by your financial institution to report stock sales (for every stock sale we will need the purchase date and purchase price)

IF YOU HAVE ANY OF THE FOLLOWING YOU WILL NEED TO COMPLETE OUR LONG FORM TAX ORGANIZER

- you own a home
- you have dependents
- you have unreimbursed business related expenses
- you own rental property

THE LONG FORM TAX ORGANIZER MAY BE FOUND ON OUR WEBSITE AT :

yachtpayroll.com (under the forms menu)

IF YOU QUALIFY FOR THE FOREIGN INCOME EXCLUSION WE WILL NEED YOU TO COMPLETE THE "TAX CALENDAR"

yachtpayroll.com (under the forms menu)

IF YOU ARE A SIGNOR OR BENEFICIARY OF A FOREIGN BANK ACCOUNT YOU WILL NEED TO COMPLETE THE "FOREIGN BANK ACCOUNTS"

yachtpayroll.com (under the forms menu)