

Form <b>9209</b> (Rev. September 2005)	Department of the Treasury-Internal Revenue Service <b>Bona Fide Residence/Physical Presence Questionnaire</b>	In reply refer to:
Taxpayer's name and address		Tax Year
		SSN
		Principal place of employment

**Please complete this questionnaire.**

**Part I - Bona Fide Residence Test**

Please furnish the following information to establish whether you would qualify as a bona fide resident of a foreign country during the above tax year. If you need more space, continue on a separate sheet.

Name of country in which you are claiming residence	Date you first arrived in that country.	Kind of Visa used
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Did your Visa contain limitations on length of stay or employment? Yes  No  If yes, please explain.  
At what interval is Visa renewable?

Foreign employee's name and complete address

Kind of work performed	Income earned during tax year
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**Basis of Employment**

How long did you originally intend to stay in the foreign country?	Were you under contract in the foreign country?
Did you change this intention? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, when, and how long did you then intend to stay?	Was there an option to extend the contract? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, please explain and state for how long.

Did you file an income tax return with the government of the country in which you claimed residence? Yes  No   
If Yes, please attach a complete copy of the return to this questionnaire. If No, please explain.

Were you subject to all laws and restrictions governing the citizens of the foreign country? Yes  No   
If No, please explain.

Kind of living quarters: <input type="checkbox"/> Purchased house <input type="checkbox"/> Quarters furnished by employer <input type="checkbox"/> Rented room <input type="checkbox"/> Rented house or apartment <input type="checkbox"/> Other (Explain.) _____	Did your family live with you abroad during any part of the tax year? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, for what period? _____
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Visits to the United States - Please list dates and purpose of trips.

Other information - Please list any other information you believe may help establish your claim to residence in a foreign country.



Form <b>9211</b> (Rev. September 2005)	Department of the Treasury-Internal Revenue Service <b>Foreign Earned Income Exclusion Questionnaire</b>	In reply refer to:
Taxpayer's name and address		Tax Year
		SSN

To assist us in the examination of your return, please answer all of the following questions. If not applicable, enter "N/A."

Dates you lived in a foreign country in the year shown above	Foreign country for which expenses are claimed (address)
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Type of accommodations (such as house, furnished apartment, mobile home)	Did you own or rent a home in foreign country? Own <input type="checkbox"/> Rent <input type="checkbox"/>	Did you live in quarters provided by your employer? Yes <input type="checkbox"/> No <input type="checkbox"/> If, Yes, give dates
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Did your employer pay directly, or reimburse you for any housing expenses? Yes  No

If Yes, please complete the following:

Amount you paid \$	Amount paid by your employer \$	Amount your employer reimbursed to you \$
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Did you or your spouse receive any housing allowance from the U.S. Government? Yes  No

If Yes, what amount? \$

Did you maintain a separate household outside the United States for your family at a place other than your tax home because of adverse living conditions at your tax home? Yes  No  If yes, please indicate which housing expenses listed below pertain to this household.

**Housing Expenses - Please itemize all housing expenses and attach proof of payment**

Kind of Expense	Amount

Did either you or your spouse receive income in the year shown above that was earned in another year? Yes  No

If Yes, show amount, type and year earned.

Did either you or your spouse receive income in another year that was earned in the year shown above? Yes  No

If Yes, show amount, type and year received.

Did you move during the above year or the year before? Yes  No  If Yes, please complete the following:

Note: Include amounts your employer paid directly to shippers, airlines, hotels, or anyone else on your behalf.

Date you moved to a new location	Amount of moving expense deduction \$	Amount you were reimbursed for moving \$
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If your move was not during the year shown at the top of this questionnaire, attach a copy of Form 2555, Exemption of Income Abroad, for the year you moved.

**Certification:** Under penalties of perjury, I declare that I have examined this statement and, to the best of my knowledge and belief, it is true, correct, and complete.

Your signature	Date
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2. d. Did the partnership conduct business in the U.S., or receive income from U.S. sources for this tax year? Yes  No

If Yes, what was the percentage of the partnership's U.S. income in relation to its worldwide business activity. \_\_\_\_\_ %

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**Part III Income from A Closely Held Business**

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Please complete the following questions and submit the requested information on the entity that employs you.

1. Do you, a member of your family, or any other related party, own any stock or have a controlling interest, either directly, indirectly (*through a partnership, corporation, trust, etc.*), or constructively, in the entity which employs you? Yes  No

If Yes, please provide the following information:

a. Name(s)

b. Relationship (*include self*)

c. Social security number

d. Number of shares owned

e. Percentage of shares owned

f. Type of shares owned      Common       Preferred       Voting       Non-Voting

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Remarks

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Certification: Under penalty of perjury, I declare that I have examined this statement and, to the best of my knowledge and belief, it is true, correct, and complete.

Your signature	Spouse's signature, if a joint return was filed	Date
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# Foreign Earned Income Questionnaire

**Taxpayer's Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_ **Year:** \_\_\_\_\_

**Foreign address:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Did any of your family members live with you abroad? If yes, list name and relationship.**

**If your dependents were living with you, what type of school they attended at the foreign country?**

**Do you own a property in foreign country? If yes, list address and provide copy of deed.**

**Do you have a driver's license issued by the foreign country? If yes, provide copy.**

**Do you own a car in the foreign country? If no, what means of transportation do you use?**

**Are you registered to vote in the foreign country?**

**Do you speak the language of the foreign country where you are located? If yes, provide the following information.**

**Write:** \_\_\_ Fluently \_\_\_ Good \_\_\_ Poorly

**Speak:** \_\_\_ Fluently \_\_\_ Good \_\_\_ Poorly

**Read:** \_\_\_ Fluently \_\_\_ Good \_\_\_ Poorly

**Do you have any bank accounts, investments accounts, etc. in the foreign country? If yes, provide name of banks.**

**List type of passport and provide copy of passport (pages related to year in audit).**

# Foreign Earned Income Questionnaire

Date when your Bona fide residency began:

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Please provide the location of your tax home and the date when it was established

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Do you pay any taxes in foreign country? If no, explain reason why you are not required to pay taxes.

If yes, provide proof of taxes paid.

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Where did you live before of moving to the foreign country?

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What will you do once your contract in the foreign country is terminated?

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Please provide a copy of your work contract.

Please provide a detailed description of your work in foreign country:

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Please provide a detailed description of your work prior to establishing yourself in the foreign country:

# Foreign Earned Income Questionnaire

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**Where did you live before moving to foreign country? If property was owned, what did you do with the property?**

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**What did you do with the furnishings of the home in the US?**

**Did you own an automobile prior to moving to the foreign country? If yes, what did you do with that automobile?**

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**Did you abandon your right to vote in the United States?**

**Please provide a detailed statement explaining why do you understand that you qualify to claim Bonafide Residency for the purpose of excluding your foreign earned income. Provide facts and circumstances to support your position.**

