

JAN MARIE DOUGHTY, CPA
Florida Property & Business Services LLC
CLIENT INFORMATION SHEET (CIS08)
PERSONAL DETAILS – Year ending 31 DECEMBER 2008

Owner(s) of US Property	(first owner) A	(second owner) B
Name(s) per passport	<small>First</small> _____ <small>Last</small> _____	<small>First</small> _____ <small>Last</small> _____
New Clients - please complete information sheet in full. (Please call if you have any queries).		
If I filed your year 2007 US 1040NR tax return please show amendments and additions only and confirm NO CHANGE from last year by ticking the right hand boxes ►►►►►► ▼▼		
% of Ownership Interest		
Country of Citizenship		
Country of Residence		
US Tax Identification Number <i>Individual Tax Ident Number</i>	ITIN — — NOT sales tax Identification	ITIN — —
Marital Status		
Date of Birth		
Contact Details } N° / Street City County/Post Code		If different from first owner
UK Address } UK Home Contact Tel N°		
UK Work Telephone Number		
UK Mobile Number		
UK Fax Number		
E-Mail address		
Passport – Country of issue		
Visa type & number – if any		
Were you ever a US citizen		
Entry to US – Date of first entry		
US entry/exit dates in 2008		
Purpose of visits to US-2008		
Number of days you were in the US (including vacation & Nonwork days during;-	2006..... 2007..... 2008.....	2006..... 2007..... 2008.....
Have you filed a US income tax return before the year 2008	YES / NO (If yes and a new client, please attach copies)	YES / NO (If yes and a new client, please attach copies)

Your US PROPERTY DETAILS

US Property Address: } N° / Street City/ZIP County		
	(eg Osceola, Polk, Lake, Orange etc.)	
US Telephone/Fax Number (if any)		
Property Management Company during 2008		
Date your property was first available to rent		
Total cost of Furnishings Package \$ (USD) * (This will be used to produce your Tangible Personal Property Tax Return)	(* must be provided to enable Tangible Personal Property Return to be completed) Estimate if necessary	
Date Furnishings package purchased * (Major new additions for current year please list separately)		
Would you like me to file your DR-405 Tangible Personal Property Tax Return	YES / NO	Should be filed by April 1 st 2009 Existing clients should receive a completed return from me in January/February for review and signature

Please **DO NOT** forward the U.S. Internal Revenue 1040NR EZ or 1040NR forms & instruction booklet usually received in March

PLEASE EMAIL or FORWARD THE DOCUMENTS & INFORMATION REQUESTED TO:

JAN MARIE DOUGHTY, CPA [Florida Property & Business Services LLC]

PO Box 41, Chichester, West Sussex PO20 1UZ United Kingdom ☎/Fax (01243) 536026.

email: FPBS@FloridaPBS.com website www.FloridaPBS.com

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Florida Property & Business Services LLC
YEAR END INFORMATION - Year ending 31 December 2008

Taxpayers Name(s): _____

US Property address: _____

CHECK LIST

(Please tick in centre box, if item is enclosed and enter number of Personal use days)

STATEMENTS REQUIRED	✓	EXPLANATION
Mortgage Interest Statement-2008 Form 1098 if US Mortgage <input type="checkbox"/>	<input type="checkbox"/>	Statement from your mortgage company showing the total interest paid by you in 2008. Please attach a <u>copy</u> . (Should be received from your US mortgage Co in January 2009, - please obtain similar from UK companies
Purchasing Settlement statement	<input type="checkbox"/>	New clients (and for additional US properties) [sometimes called a HUD statement] please forward a <u>copy</u>
Selling Settlement Statement	<input type="checkbox"/>	If you sold in the current year please forward a <u>copy</u> . Also, please forward form 8288-A from the title company if withholding has been sent to the IRS.
Number of Personal Use Days	<input type="checkbox"/>	Number of days your home was used by yourselves, your family and friends where no rental income was collected.

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RENTAL INCOME AND EXPENSES FROM ALL SOURCES

REVENUE:	(for calendar year ended 31 December 2008)	\$ US Dollars
	Rental Income (net of Sale & Tourist Tax)	
EXPENSES:	(for calendar year ended 31 December 2008)	
	Advertising	
	Auto and Travel	
	Cleaning & Maintenance	
	Commissions	
	Insurance	
	Legal & Professional Fees	
	Management fees	
	Mortgage interest qualified	
	Repairs	
	Supplies	
	Real estate taxes	
	Utilities (Telephone, Cable TV, Electric, Water etc.)	
	Licences & Fees	
	Tangible Personal Property Tax	
	Bank charges	
	Home Owner Association Fees	
	Other (please list)	
Signature	Confirming the information provided is correct and authorising FloridaPBS to complete your tax returns	

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