

Tax Organizer—Expatriate (Continued)

PART 5—Housing Information

	You Paid	Employer Paid or Reimbursed	Total
House or apartment rent (do not include hypothetical housing retained by employer)	\$ _____	\$ _____	\$ _____
FMV of employer-provided housing	_____	_____	_____
Repairs	_____	_____	_____
Utilities (not including telephone)	_____	_____	_____
Real and personal property insurance	_____	_____	_____
Nondeductible occupancy taxes	_____	_____	_____
Nonrefundable fee for securing lease	_____	_____	_____
Furniture/appliance rental	_____	_____	_____
Residential parking	_____	_____	_____
Lodging portion of temporary living expense upon move	_____	_____	_____
Total housing costs	_____	_____	_____

PART 6—Compensation Information

Normal:

Base salary	\$ _____		
Pre-tax deductions	(_____)		
401(k) elective deferrals	(_____)		
Commissions	_____	Year related to _____	
Incentive bonus	_____	Year related to _____	
Group-term life insurance	_____		
Stock options	_____	Granted _____	Exercised _____
Type _____	_____	Grant price _____	Exercise price _____
Other: _____	_____	Year related to _____	

Assignment-related:

Housing reimbursement	_____		
Employer-provided housing	_____		
Utilities	_____		
Cost of living allowance	_____		
Education	_____		
Family allowance	_____		
Home leave	_____		
Automobile	_____		
Moving	_____	Date of move _____	
Foreign taxes—current year	_____		
Foreign taxes—future/prior year	_____	Year _____	
U.S. taxes—current year	_____		
U.S. taxes—future/prior year	_____	Year _____	
Storage	_____		
Hypothetical tax withheld by employer	(_____)		
Hypothetical housing withheld by employer	(_____)		
Other: _____	_____	Year related to _____	

Total compensation _____