

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 _____