

EY TaxChat 2019

Foreign wages (Form 2555) Questionnaire

You answered that you had foreign wages during 2019. If you are an expatriate who is a U.S. citizen or resident alien working in a foreign country, you may qualify for the foreign earned income exclusion reported on Form 2555. This generally applies if you are (or have been) working outside of the U.S. for a long-term period (generally more than one year). If you received income for services performed in a foreign country during 2019, please complete the questionnaire.

Important Notes:

- Enter wages paid during your foreign employment only
- Enter all amounts in USD
- If you were paid in two separate country payrolls during the foreign work period, please copy the "Foreign Wages and Other Income" pages and enter the wages reported in each separate payroll so your wages will not be duplicated.

For more information, please visit the IRS links below or reach out to your EY TaxChat team via chat if you have any questions:

<https://www.irs.gov/instructions/i2555>

<https://www.irs.gov/individuals/international-taxpayers/us-citizens-and-resident-aliens-abroad-filing-requirements>

Please note that not all mobile phones support fillable .pdf forms. You can also access these forms at www.tax.chat



2019

Foreign Employment Information

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General Information:

TS _____

Foreign address _____
.....
.....

Name of employer _____

Employer's U.S. address _____
.....
.....

Employer's foreign address _____
.....
.....

Employer type: Foreign entity, U.S. company,
Foreign affiliate of a U.S. company, Self _____

Enter the last year that Form 2555 was filed to
claim either of the exclusions _____

Type of exclusions revoked in prior years _____

Year exclusion revoked _____

If a separate foreign residence was maintained for your
family due to adverse living conditions, please provide
the city, country, and number of days maintained _____

List tax home(s) during tax year and dates established _____

Country of citizenry or nationality _____

Qualified housing expenses for the tax year

Tax Home History:

	Principal City and Country of Employment	Start Date (Mo/Da/Yr)	End Date (Mo/Da/Yr)
Most recent tax home			
First previous tax home			
Second previous tax home			
Third previous tax home			



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Foreign Employment Information

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Bona Fide Residence Test Information:

Beginning date for foreign residence (Mo/Da/Yr) _____

Ending date for foreign residence (Mo/Da/Yr) _____

Kind of foreign living quarters:

Purchased house, Rented house or apartment, Rented room,

Quarters furnished by employer _____

If any family members lived abroad with you during any part
of the tax year, enter their names. Include the dates when
the family members lived with you

Relationship	First Name	MI	Last Name	Date Arrived	Date Left	X if Entire Period

Was a statement made to foreign country authorities declaring you
were not a resident of their country?

Yes

No

Were you required to pay income tax in that country?

Does the foreign country have an income tax?

State any contractual terms or other conditions relating to the
length of employment abroad

What type of visa was used to enter the foreign country?

Explain any limitations of the visa as to length of stay or
employment in a foreign country

If a home was maintained in U.S. while residing abroad, show
address, whether rented, names and relationships of occupants

Address

Street address

City

State

ZIP Code

X if rented

Occupants			
First Name	MI	Last Name	Relationship

Foreign Taxes Paid

Tax Year

Amount

Date paid

Foreign taxes paid with tax return

Total foreign taxes withheld

(Mo/Da/Yr)

(Mo/Da/Yr)



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Foreign Employment Information

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Travel Abroad for 12 Month Period:

Name of Country (Including U.S.)	Date Arrived (Mo/Da/Yr)	Date Left (Mo/Da/Yr)	Full Days in Country	Number of Days Present in U.S. on Business

During 2019, in which state(s)/city(ies) did you work? List the dates

State/City	From (Mo/Da/Yr)	To (Mo/Da/Yr)	Days Worked

Total (must agree with U.S. days worked shown above)

Days in U.S. for any reason 2018____ 2017____



2019

Foreign Housing Expenses Worksheet

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Indicate below (for yourself, spouse and dependents living with you) the amount of housing expenses incurred (whether paid by you or your employer) in the foreign country. **Please enter all expenses in USD.**

	Amount Reimbursed to You or Paid on Your Behalf by Employer	Amount Paid by You Which is NOT Reimbursable by Your Employer	Total Expenses
Rent			
Fair market value of employer-owned housing furnished to you (Without reduction for U.S. equivalent housing charge)			
Foreign real estate, occupancy taxes or television taxes (not included on Medical Expenses and Taxes form, detail by country on continuation sheet)			
Utilities (but not telephone charges)			
Real and personal property insurance			
"Key money" or other similar nonrefundable deposits paid to secure a lease			
Repairs and maintenance			
Furniture rental			
Lodging portion of temporary living expenses (Do not include on Moving Expenses page)			

Other Expenses:

Description	Amount Reimbursed to You or Paid on Your Behalf by Employer	Amount Paid by You Which is NOT Reimbursable by Your Employer	Total Expenses

Total expenses			
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Indicate if meals and/or lodging were provided by or on behalf of your employer on his business premises:
(If you resided in a camp, you are considered to be on the business premises of your employer.)

	Yes	No
To you	<input type="checkbox"/>	<input type="checkbox"/>
To your family members	<input type="checkbox"/>	<input type="checkbox"/>



Choose one: Country payroll these wages were paid from during your foreign work:

Paid from US payroll: _____

Paid from Foreign payroll: _____

Important Note: Enter wages paid during your foreign employment and in USD only. If you were paid in two separate country payrolls, copy this page and enter wages reported in each separate payrolls so your wages will not be duplicated.

Foreign Questions for 2019:

If you will be outside the U.S., do you want an automatic extension if you qualify? Additional fees may apply.....

Will any tax due be paid with the extension?

If you were working outside the U.S., did you terminate your foreign employment in 2019?

Did you have foreign income derived from sources within designated "Boycott Activities"?

If Yes, provide all information pertaining to the boycott activities.

Yes	No

Foreign Source Wages and Salaries:

Include all copies of your current year Forms W-2 or other wage statements

TS ____

Employer name _____

Employer address _____

Employer city _____

Employer state _____

Employer ZIP _____

Employer foreign country _____

Base wages	
Federal tax withheld	
FICA withheld	
Medicare tax withheld	
Days in foreign country before foreign location	
Days in foreign country after foreign location	
Days in U.S. while on foreign location	

2019 Amount	2018 Amount

Allowances and Reimbursements:

Cost of living and overseas differential	
Moving expense reimbursement	
Family	
Education	
Home leave	
Quarters	
Bonus	
Stock option - current year	
Foreign tax reimbursement	
Survivor's insurance	
Automobile	
Hardship premium	
Home gross salary	
Tax adjustment - current year	
Gross up	
Mobility premium	
Relocation allocation	
Wire transfer allowance	
Home housing allowance	
Home gross entitlement	
Home net entitlement	
Variable pay awards	
Miscellaneous	
Imputed tax preparation fees	
Home country pension cost	
401(k) reductions	

[illegible]



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Foreign Wages and Other Income
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Important Note: Enter wages paid during your foreign employment and in USD only. If you were paid in two separate country payrolls, copy this page and enter wages reported in each separate payrolls so your wages will not be duplicated.

Other Income and Noncash Income:

TSJ	Nature and Source	2019 Amount	2018 Amount

Enter Any Additional Information: