

US Expatriate Taxes - Filing Abroad

United States citizens living abroad are required to file annual U.S. income tax returns and report their worldwide income if they meet the minimum income filing requirements for their filing status and age. However, as an expatriate with a tax home in a foreign country you may be eligible to exclude up to \$87,600 for 2008 of your foreign earned income from US taxation by meeting one of two tests. In addition, you may also be able to deduct part of your qualifying housing cost and receive a credit for taxes paid to a foreign government. If your tax home is in a foreign country on April 15th then you have an automatic extension until June 15th to file your tax return. However, if you ultimately have a tax liability, interest will begin to accrue as of April 15th.

If you would like to have your 2008 tax return completed before June 15, 2009, please submit your tax information before May 27, 2009.

To begin the process, please complete our 2008 US Tax Organizer in Excel format (attached) or by going to the following link:

<https://www.taxnotebook.com/tnstart.asp?welcome=JY1361507>

If you have additional tax documents please either fax a copy to us at (714) 939-1032, email them as an attachment, or mail the documents. We will use the information you provide to prepare your US federal and state (if applicable) tax returns. Once you submit the Tax Organizer, we will contact you with any questions we may have. When the return is complete, we will then send you your completed income tax return as a PDF file for your review. If you are abroad you may express mail the return to the appropriate IRS tax offices or retain us to file the return for a supplemental fee (\$75).

Our fees for processing and filing US expatriate tax returns are as follow, per tax year (bulk discounts are available):

- \$550 USD for Federal Individual Income Tax Return
- \$125 USD for filing your State tax return (if applicable)
- \$50 to e-file (if applicable)
- \$50 USD to File Extension (if applicable)
- \$50 USD for disclosing foreign bank accounts (if applicable)

Please note that our fees are charged to you over two payments, the first (50% retainer fee) at the commencement of work on your tax return and the second upon completion of your tax return. In the event that a particular tax return will have a higher fee we will contact you before the work is performed. The fee also includes any consultation you may require during the tax year, as well as, your periodic news letter on updates in US tax law.

If you currently do not have the need to have your tax return prepared but would like a consultation, please reply to this e-mail with your phone number, date (Monday – Friday) and time (PST) you would like to schedule the consultation.

For your convenience, we accept MasterCard, American Express, and Visa credit cards as well as US personal checks.

Please feel free to contact me if you have any questions or if I may be of further service. I look forward to working with you throughout the tax season.

Best regards,

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Senior Tax Consultant

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