

Appendix B – RETURNING Client with NO TAX HOME

Below is all of the information we need if you do not have a tax home. It is more to determine how to file you based on residency requirements and to let us know how your income was taxed. You will notice there is no mileage to keep track of unless you are qualifying for moving expenses. Sad, but true. With no tax home, you can no more deduct commuting miles than a regular employee. But on the other hand, there is a whole lot less record keeping involved. If you are unsure if you were taxed on reimbursements, leave the box empty and we will try to help you determine that from your contracts. Some contracts are less clear than others, and if you can, enclose a check stub with these.

Assignment Itinerary

	Assignment 1	Assignment 2	Assignment 3	Assignment 4	Assignment 5
Start Date (mm/dd/yy)					
End Date (mm/dd/yy)					
Location : City & State					
Were you taxed on meals? <i>n/a = did not receive</i>	Y <input type="checkbox"/> N <input type="checkbox"/> n/a <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/> n/a <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/> n/a <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/> n/a <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/> n/a <input type="checkbox"/>
Enter amount of meal reimbursement Only if NOT taxed					
Did you live in company provided housing or receive a stipend?	Housing <input type="checkbox"/> Stipend <input type="checkbox"/>	Housing <input type="checkbox"/> Stipend <input type="checkbox"/>	Housing <input type="checkbox"/> Stipend <input type="checkbox"/>	Housing <input type="checkbox"/> Stipend <input type="checkbox"/>	Housing <input type="checkbox"/> Stipend <input type="checkbox"/>
Were you taxed on the value of the housing or the stipend? <i>n/a = did not receive</i>	Y <input type="checkbox"/> N <input type="checkbox"/> n/a <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/> n/a <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/> n/a <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/> n/a <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/> n/a <input type="checkbox"/>
Enter amount of housing Only if NOT taxed					
OR Amount of combined or blended reimbursements Only if NOT taxed					
Other untaxed reimbursements					

No Tax Home Moving Expenses – Unfortunately the IRS only allows for moving expenses if you *expect* to be in one location for at least 9 months AND / OR *have been* in one location for at least 9 months. Enter expenses here for any moves that qualify.

	Move 1	Move 2		Move 1	Move 2
Miles from your OLD Home to NEW workplace			Miles from OLD home to OLD workplace		
Miles driven to new residence			Tolls		
Lodging expenses			Car or trailer rental		
Utility hook ups			Shipping		
Up to 30 days of storage fees			Cost of hiring movers		
Reimbursements			Other		

Moves to Foreign Countries

Date of Move _____ City and country of old workplace _____
 City and country of new workplace _____

Initial or dig signature _____