

Initial Questionnaire for Zoom Consultation

TAX ADVISOR / CLIENT COMMUNICATIONS PRIVILEGED UNDER IRC SECTION 7525

1. Personal Information

Full Name: _____

What is your nationality, and do you hold any additional citizenships or residences?

What is your marital status, and if applicable, what is your spouse's nationality?

2. Relocation Details

How long do you intend to stay in the destination country?

- Temporary (less than 2 years)
- Medium term (2-5 years)
- Permanent (5+ years or indefinite)

Do you already have a visa in mind or under application?

After relocating, how frequently do you expect to travel back to your current country of residence? _____

3. Tax & Financial Overview

In which countries do you currently file tax returns? _____

Sources of Income

Please provide rough estimates in US Dollars for each applicable income source. Leave blank if not applicable.

- Employment income _____
- Self-employment or freelance work _____
- Business ownership _____
- Investments and capital gains _____
- Pensions (private sector) _____
- Pensions (public sector) _____
- Social security _____
- Rental income _____
- Cryptocurrency or digital assets _____
- Royalties or intellectual property _____

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4. Real Estate & Property

Do you own real estate in any country? _____

Market value of investment properties _____

5. Bank & Investment Accounts

In which countries do you currently hold bank or investment accounts?

Approximate total market value of all accounts _____

6. Advanced Structures & Instruments

Do you have any of the following structures or instruments?

- Trusts
- Foundations
- Holding companies
- Investment-linked life insurance policies

7. Net Worth & Estate Planning

What is your approximate net worth range? (A broad estimate is sufficient)

Do you currently have a will or an estate plan in place?

8. Motivation & Objectives

What is your primary motivation for relocating?

- Lifestyle
- Tax planning
- Business expansion
- Retirement
- Family considerations

