



Tax Checklist in File

____年 报税签收清单

Client Name 客人名字: _____ Personal information 个人信息: Birth Date 生日 SSI 社安号 Married 已婚 Single 单身 Tele: _____ Email: _____

Income 各种收入数额 :

W-2 工资及各种收入 _____

Foreign Income 工资及各种收入 _____

1099 Misc 合同工收入/1099 其他 _____

K-1-F1065 合作伙伴公司收入 _____ 1120S S-公司收入 _____

1099 Int 利息&Div 股息 _____ (We need a bank list if there is more than 3 statements) _____

1099 B Stock trading reports 股票交易利得和损失报告 _____

Obamacare 1095 A 奥巴马医疗保险报告 _____

1098 房屋贷款利息金额 _____

Real Estate Property Tax 房地产税 _____

Car information (Mileage, purchase info) 车的里程数和新车购买信息 _____

Business info 个人和 LLC 公司收入和支出 _____

Rental info 房产租赁收入和支出 _____

Donation 捐款 _____ Medical 医疗 _____

Childcare/Dependent 托儿费用和托儿所信息 _____

Tuition (1098-T) 学费 _____

Foreign Account 国外银行和保险户头 _____

US staying days in 3 years 美国境内停留天数: _____ 1/6 前年 _____ 1/3 去年 _____ 今年 _____

Other 其他 _____

Prior Year Tax Return (若新客户, 请提供) 去年税表 _____

Estimated Tax Payment including with extension (已付税款) _____

Bank information for tax payment and refund (交税和返税银行信息) Name: _____ Rt _____ Acct _____

A copy of a Driver License for taxpayer _____

All the information provided in this questionnaire is true and accurate to the best of my knowledge. 尽我所有认知, 所有在这份问卷中提供的信息是真实准确的。

Client Signature 客户签字 Date 日期

Note:
1. We will need both payment _____ and F8879 _____ to file your return.
2. We will send you the accepted notice every Friday along with a copy of your final return only once without a charge.