



Tax Checklist in File

____年 报税签收清单

- Client Name 客户名字: _____ DOB 生日 _____
- Married 已婚 Single 单身 Tele: _____ Email: _____ SSI 社安号 _____
- Income 各种收入 (For 2020, notice 1444 Economic Impact Payment)
 - W-2 工资及各种收入 _____ Foreign Income 工资及各种收入 _____
 - 1099Misc 1099NEC 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 _____
- 1099Int 利息&Div 股息 _____ (We need a bank list if there is more than 3 statements) _____
- 1099B Stock trading reports 股票交易利得和损失报告 _____
- 1095A 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 _____
- Business 个人和 LLC 公司收入和支出 _____ Car information (Mileage, purchase info) 车的里程数和新车购买信息 _____
- Rental 房产租赁收入和支出 1099 S (if sold 房屋买卖) _____
- 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 & Date of Birth (若新客户, 请提供) 去年税表 和 **每个人的生日** _____
- 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
- Signed Engagement Letter Retainer \$150

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

*. We will need both full fee payment _____ and signed F8879 _____ to file your return.
*. We will send you the accepted notice every Friday along with a copy of your final return ONLY 1 time without a charge (\$5 per additional request)