

Buddha Tax and Accounting www.cpabuddhatax.com

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Taxpayer and Spouse and Dependent Information

Filing Type: Single Married Filing Joint Married Filing Separate Head of House (with qualifying person)
 Widow (with dependent child) Non resident alien (1040-NR filing)

Tax Payer/OR Husband Husband Occupation:

First Name: _____ Middle Name: _____ Last Name: _____
Social Security #: _____ Date of Birth [MM/DD/YYYY]: _____
Street Address: _____ Apt#: _____ City: _____ State: _____ Zip code: _____
Bank Name: _____ Bank Account#: _____ Bank Routing #: _____
Phone #: _____ Tax payer Email: _____
Driving License #: _____ Issue date: _____ Exp Date: _____ State: _____

Spouse/OR Wife Spouse Occupation:

First Name: _____ Middle Name: _____ Last Name: _____
Spouse SS#: _____ Spouse Date of Birth: [MM/DD/YYYY]: _____
Spouse Phone #: _____ Spouse Email: _____

Dependents: (You need to show original social security card and show proof of residency to verify child information)

1. (CIRCLE ONE) Son /Daughter /father /mother /other

First Name: _____ Middle Name: _____ Last Name: _____
Social Security #: _____ Date of Birth: _____
 Full time Student Lived more than half year You support more than half expense Disabled Other

2. (CIRCLE ONE) Son /Daughter /father /mother /other

First Name: _____ Middle Name: _____ Last Name: _____
Social Security #: _____ Date of Birth: _____
 Full time Student Lived more than half year You support more than half expense Disabled Other

3. (CIRCLE ONE) Son /Daughter /father /mother /other

First Name: _____ Middle Name: _____ Last Name: _____
Social Security #: _____ Date of Birth: _____
 Full time Student Lived more than half year You support more than half expense Disabled Other

Important Compliance notes [please read and put check mark on the box where applicable]:

- You must provide us your health insurance information for whole family to include on your tax return.
- You must report Foreign Financial/Bank Account [outside of USA] exceeding (more than) \$10,000.
- You must comply with FATCA rules and regulation. [separate engagement might be needed]
- Please seek legal counselor for legal advice. We do not provide any legal advice.
- Please ask us other Checklist to find out what income to report and what expense you can claim on your tax return.
- Income & Other Information: [Provide source documents w2, 1099, bank statements if self employed for deposits]
- Note that you should pay our fee; provide required documents; and you and your spouse must sign the return before efilng your return. If return is late due to your negligence, we are not responsible for late filing.

Note: Please provide us W-2, 1099 Forms, business summary and other source of ALL income you received for the entire year. To claim deductible expenses please provide us bills & receipts and 1098 Forms for expenses you are claiming. Please keep your detailed information with you for 4 years. For direct deposit, you need to provide us a VOIDED Check of your bank account.

The information provided on this form is true, accurate and are from actual records. I/(we) here by authorize Buddha Tax and Accounting and its representative to prepare and file my/(our) income tax return.

Provide a Voided Check for tax deposit or payment. Return preparation FEE is due up front.

Taxpayer Signature
Date:

Spouse Signature
Date: