Required details for Non-resident tax preparation

(Fill the info that applies to you)

(Send your W2s, bank interest, any 1099, 1098 or tuition statement and a copy of last year tax return)

Tax Payer First Name: Middle Name: Last Name:

SSN:

Date of Birth:

Occupation:

Current home Address:

Phone Number:

Email address:

Name of the Bank (within US) for Refund Direct Deposit or balance due:

Bank Routing Number: Account Number:

Account Type - Checking/Savings

Questionnaire:

1. Date you came to US first time?
2. Of What country were you a citizen or national during the tax year?
3. In what country did you claim residence for tax purposes during the tax year?
4. Have you ever applied to be a green card holder of the US?
5. Were you ever a US Citizen?
6. Were you ever a green card holder of US?
7. Your visa type on Dec.31st 2021. If you did not have a visa, enter your US immigration status on the last day of the tax year.
8. If your visa changed during 2021,

Date of the change: Your previous visa type:

1. Days you are in US for past 3 years. Please list number of days separately.

<http://www.timeanddate.com/date/duration.html>

2019 2020 2021

1. If you travel out of US in 2021, please provide dates you entered and left during 2021:

Date out of USA: Date came back to USA:

1. Did you file a tax return last year?

If yes, what year and what form? (Is it 2019 or 20, what form – 1040 or 1040NR)

1. Your Passport Number:
2. Enter the name, address and telephone number of the academic institution during the year
3. Enter the name, address and telephone number of the Director of the academic or other specialized program you participated during the year
4. Type of visa (F, J, M or Q) you held during the past 5 years.

2017:

2018:

2019:

2020:

2021:

More details for some states: (Answer whatever you can)

Rent paid per year:

Health Insurance per year:

City and County, you lived:

School District:

If you lived in Multiple states in 2021 -

From and To Dates you stayed in each state

1.

2.

Required DRIVER’S LICENSE / STATE ID scanned copies for tax payer and spouse for e-filing. Tax returns without driver license can be e-filed but will take longer time to process. FYI.

NOTE: We prepare only Federal and State income tax returns. We do not prepare local/city taxes for most of the areas. You need to take care of city taxes by yourself.

Notes to tax preparer:

