



# Individual Tax Filing Information

# 2025

**Taxpayer & Spouse Information:** [Existing client MUST fill out Name, Address, and changed information & SIGN]

**Tax Payer Name:** \_\_\_\_\_  
First Name \_\_\_\_\_ Middle Name \_\_\_\_\_ Last Name \_\_\_\_\_

**Tax Payer Address:** \_\_\_\_\_  
Full Street Address \_\_\_\_\_ Apt# \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

**Tax Payer SS#:** \_\_\_\_\_ **Tax Payer DOB:** [MM/DD/YYYY] \_\_\_\_\_

**Phone No.** \_\_\_\_\_ **e-Mail Address:** \_\_\_\_\_

**Tax Payer Occupation:** \_\_\_\_\_

**Spouse Name:** \_\_\_\_\_  
First Name \_\_\_\_\_ Middle Name \_\_\_\_\_ Last Name \_\_\_\_\_

**Spouse DOB:** [MM/DD/YYYY] \_\_\_\_\_ **Spouse SS#:** \_\_\_\_\_

**Phone No.** \_\_\_\_\_ **e-Mail Address:** \_\_\_\_\_

**Spouse Occupation:** \_\_\_\_\_

**Filing Status (Please tick mark in one):-**  **Single;**  **Married Filing Jointly;**  **Married Filing Separately;**  
 **Head of Household** (with qualifying person);  **Qualifying Widow(er)** (with dependent child)  
 **Non Resident Alien** (need to file 1040NR)

**Special Note (if any):** \_\_\_\_\_

**Dependent Information** (You Must show us original SS Card & provide proof of residency in order to verify child information):

**Name** [write below this line] [write below this line] **SS#** [write below this line] **DOB** [month/day/year] **Relationship**

1. \_\_\_\_\_  
[ ] Living with you more than half year; [ ] You support more than half; [ ] Full time college student; [ ] Disable; [ ] Other
2. \_\_\_\_\_  
[ ] Living with you more than half year; [ ] You support more than half; [ ] Full time college student; [ ] Disable; [ ] Other
3. \_\_\_\_\_  
[ ] Living with you more than half year; [ ] You support more than half; [ ] Full time college student; [ ] Disable; [ ] Other

**Important Notes for Compliance [please read and put tick mark on the box after you understand it]:**

- [ ] 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 the USA] Greater than \$10,000.
- [ ] You must comply with FATCA rules and regulation. [you can engage us for such with separate engagement]
- [ ] Please note: 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.
- [ ] Please note: we don't provide any legal advice please contact your legal consular for legal advice.
- [ ] Please ask us other Checklist to identify what income to report and what expense you can claim on your tax return.
- [ ] **Income & Other Information:** [Please complete "Basic Log for Filing Information"]
- [ ] **How much STIMULUS Payment did you receive? 4<sup>th</sup> rebate \$ \_\_\_\_\_**

**Note:** Please provide us W-2, 1099 Form and other source of ALL income you received in entire year. In order to claim deductible expenses please also provide us bills & receipts or 1098 Form for expenses you are claiming. Please keep your detail information with you up to 4 years. For direct deposit, you need to provide us a VOID Check of your bank account.

The information provided on this form is true, accurate and from actual records. I/we here by authorize

**RC Accounting & Tax P.C.** and its representative to prepare and file my/(our) income tax return.

**Provide a Void-Check for a tax deposit or payment.**

**Return preparation FEE is due up front.**

**FEE is non-refundable!**

**Taxpayer Signature**  
Date:

**Spouse Signature**  
Date: