



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? 4Th 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: