Individual Tax Filing Information 2021

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 efiling 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"]**

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 **TaxRaja Management Associates, LLC** 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 *Spouse Signature*
Date: Date: