

KK Tax & Accounting Inc.
KK Insurance Brokerage Inc.
鴻信會計師/保險事務所

F1 (less than 6 years) & J1 (less than 3 years) Taxpayer Document Request List

(留學生和訪問學者報稅需要材料)

Return Client New Client

	Name	Date
E-Filed by		
Saved by		

Personal Information 个人信息

Taxpayer 納稅人: _____
Last name 姓 _____ First name 名 _____

SS#社安號碼: _____

DOB出生日期: ____ / ____ / ____ M ____ F ____

During 2022, did you own or sell any virtual currency? _____
在2022年, 您是否擁有或買賣過虛擬貨幣?

Occupation職業: _____ Telephone 電話: _____ Email 郵箱: _____

1 Current Address : _____ NJ resident need Form 1095 health Ins.

In which State did you live in 2022? _____ Date From: _____ Date To: _____ Monthly Rent: _____
State: State: _____ Date From: _____ Date To: _____ Monthly Rent: _____

2 Bank information for direct deposit of refund

Bank Name _____ Routing# _____ Account.# _____
 Checking Account or Saving Account

3 First Date & Year arrived in U.S. as F1 or J1 visa (New Client Only): Month _____ Date _____ Year _____

4 Please list total days stayed in U.S. and departure and returned date for each year of visa type below:

2020 (total # of days in US) _____ Type of Visa _____
2021 (total # of days in US) _____ Type of Visa _____

Departure date	Arrived Date	Total # of days in U.S.	Type of Visa
2022 _____	_____	_____	_____
2022 _____	_____	_____	_____
2022 _____	_____	_____	_____

5 If you filed tax return in prior year? If yes, which year _____ And type of Form: 1040NR, 1040NR-EZ or 1040,
(Please provide a copy of last year tax returns if filed)

6 School Name, Address, Contact phone and Professor name #: _____

7 Have you ever changed the visa type during the tax year?
If yes, please indicate the date you changed and type of original visa: _____

8 If you have green card before or applied for ever? Yes or No

9 Document Needed (copy is fine): Passport, Visa, Driver ID (both side), I20, I-94, Ead Card if any

10 **Following income document original or copy if any** 如有以下收入表格, 請提供給我們

<input type="checkbox"/> Form 1099-B for Stock (sch.D)	<input type="checkbox"/> Form W2
<input type="checkbox"/> Form 1099-Div / int (sch.B)	<input type="checkbox"/> Form 1042s
<input type="checkbox"/> Form 1099-Misc. (sch.C)	<input type="checkbox"/> Other Income

10 **Schedule A expenses:** Donation \$ _____

Taxpayers are responsible to submit any document if being audit by IRS or State. There will be additional charge if the taxpayer ask the CPA Firm to follow up and submit additional supporting documents if requested by IRS or Sate

(如國稅局,州或當地稅局要求提供材料證明所報的稅表內容, 客人要自己提供給稅務局。如需要會計師幫忙提供材料, 我們會額外收費。)



微信二維碼

Treaty County & amount: _____ Form 8833, Form 8843 & Form 8949
Fee \$ _____ Paid _____

Client Signature(簽名) _____

Above is true and based on actual records
以上個人和收入信息均屬實