

鸿信会计师事务所

2025 Tax Year Individual Client Interview Sheet

DATE: ____/____/____

☐

RETURN CLIENT

☐

NEW CLIENT

	NAME	DATE
E-FILED BY		
SAVED BY		

PART I - FILLED BY CLIENT

第一部分：由客户填写

Personal Information 个人信息

Taxpayer 纳税人 : (Last Name 姓)_____(First name 名)_____ Spouse 配偶 : (Last Name 姓)_____(First name 名)_____

SSN 社安号码 : _____ SSN 社安号码 : _____

DOB 出生日期 : ____/____/____ M(男) F(女) DOB 出生日期 : ____/____/____ M(男) F(女)

Occupation 职业: _____ Occupation 职业: _____

Telephone 电话: _____ Telephone 电话: _____

Email 邮箱: _____ Email 邮箱: _____

Address 现住址: _____ 现地址住了多久: _____

2024 居民州 2024 State of Resident: _____ Yearly Rent 年租金: _____

Health Insurance 医疗保险: Yes / No ☐ Full Year 全年 ☐ Partial year 少于 12 个月 ☐ Form1095A or 1095B

PART II - FILLED BY CLIENT

第二部分：由客户填写

Filling Status 婚史: ☐ Single (单身) ☐ Married (已婚) ☐ Married Filling Separate (已婚但分开报) ☐ Head of Household (一家之主 未婚或离婚(是否有离婚纸)) ☐ Widow (丧偶)

Dependent Information(被扶养者资料(例如子女等))

Last Name 姓	First Name 名	SSN 社安号码	DOB 出生日期	Relationships 亲属关系	Full-Time Student 全职学生	#of Mon. Lived with parents 同父母一起住过几个月	Child Care Expense(under age 13) 托兒費 (13 歲以下)	College Tuitions(Form 1098T) 大學學費

Bank information if direct deposit (银行资料如要直接存款)

Bank Name 银行名字: _____ Routing# _____ Account# _____ Checking ☐ / Saving ☐
(支票账户) / (储蓄账户)

EIC & Child Credit: For low income & child (低收入或有小孩者填写以下问题并提供证明)

Resident proof(居住地址证明): ☐ Doctor Letter (医生信) ☐ Medical Record (打针卡) ☐ School Letter (学校信) Other (其它證明))* _____

Support Living Cost Proof(抚养证明): ☐ Utility (煤气.电单) ☐ Water Bill (水费单) ☐ Property Tax (地税单) Other (其它證明))* _____

Relationship proof(亲属关系证明): ☐ Birth Certificate (出生紙)

Resident status(合法身份证明): ☐ Citizen (公民) ☐ G. Card (綠卡) ☐ A5 卡 ☐ C8 卡 ☐ State Driver ID (驾照)

Other Questions(以下问题如回答有, 请提供证明)

- Any virtual currency in 2025. 2025 年是否拥有或买卖过虚拟货币? _____
- Gift Receive / Given ? 是否有收到礼物赠与或赠与给别人 _____ 如有,请告诉我们并告之是否需要申我们帮忙报赠与税表
- Any Foreign Bank or other Asset over \$10,000 any day during the year? 当年任何一天是否有海外银行及金融资产超过 1 万美金?
If Over \$10,000, please provide more details to us. 如超过 1 万美金, 请提供银行名字, 账号, 开户日期, 年内最高存款额 _____

Client Signature(签名) _____

Taxpayers are responsible for submitting any document if being audited by the IRS or State. There will be an additional charge if the taxpayer asks the CPA Firm to follow up and submit additional.

(如国税局,州或当地税局要求提供材料证明所报的税表内容, 客人要自己提供给税务局。如需要会计师帮忙提供材料, 我们会额外收费.)

PART III - FILL BY ACCOUNTANT

由会计师填写

	W-2	Itemized Sch.A	Add't State	Int. & Div Sch.B	1099 Nec Sch.C	Stock / Home Sale	Rental Sch. E	K1	IRA	Tuition 1098T	Child Cre.	Other	Total
#													
Fees													

	IRS	NYS	
Refund			
Owe			

Comment: _____

Fees: _____ Paid By: _____