

CUSTOM ONE
1077 POWELL STREET
SAN FRANCISCO, CA 94108

At any time during _____, did you and/or your spouse have a financial interest in or signature authority over a financial account, (such as a bank account, securities account, or brokerage account) located in a foreign country? Yes No

海外存款一万美金以上。 有 无

Did you and/or your spouse have Foreign financial assets with an aggregate value exceeding \$50,000? Yes No

海外资产五万美金以上。 有 无

Were you married or an RDP as of December 31, _____? Yes No

_____年单身或是结婚。 单身 结婚

Did you and/or your spouse make any payments that would require you to file Form(s) 1099 for rental?.. Yes No

If YES, did you or will you file all required Form(s) 1099?..... Yes No

出租屋需要给1099表。 有 。 无

Did you and/or your spouse make any payments that would require you to file Form(s) 1099 for business?.. Yes No

If YES, did you or will you file all required Form(s) 1099?..... Yes No

生意需要给1099表。 有 。 无

READ & APPROVED

SIGNATURE DATE

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Tax Organizer

Taxable Year: _____

Name:
 Taxpayer _____ SS # _____ Birthdate/Age _____
 Spouse _____ SS # _____ Birthdate/Age _____

Address _____ Tel (Home) _____
 _____ Tel (Work) _____

Occupation: Taxpayer _____ Spouse _____

Check One: Single Married Filing Joint Surviving Widow/Widower
 Married Filing Separately (enter spouse's name/SS # Above) Unmarried Head of Household

Dependents Name	Birthdate/ Age	Social Security number										Relationship	No. of months lived in your home	

***A personal exemption is disallowed for any dependent unless the social security number is provide on the tax return.**
 Members of your family attending college may be eligible for a Hope Scholarship Credit or Lifetime Learning Credit. # of Students _____

Taxpayer: 65 or over Blind/Disabled **Spouse:** 65 or over Blind/Disabled

The checklist below could lead to helpful deductions. Please answer and provide supporting information.

Income

W-2: Husband: _____ Wife: _____
Form-1099: Husband: _____ Wife: _____
Unemployment: Husband: _____ Wife: _____
Other Miscellaneous Income: Husband: _____ Wife: _____

Expenses that may Reduce Taxes:

Home mortgage interest (form 1098): _____
Property taxes: _____
Donation: _____
Health care insurance & expenses: _____
IRA, Roth IRA, SEP, and Simple Plan: _____
Estimated Tax Payments: _____