



TAX PREPARATION QUESTIONNAIRE

To help us prepare your tax accurately and completely, please fill out this questionnaire and bring along with all your printed tax forms and information, or bring a USB drive to the appointment. If you have many tax documents to email, please save all document files in a folder, zip it, and email the folder at one time. Confirm by a text message after your email. **We do not look into your phone or laptop for tax information.**

- Text for short questions, and call or email us for long questions.
- For short document like W2s, 1099-R, please print out if possible.
- Save all tax files in a USB thumb drive and bring to the appointment.
- If you are new client or return many years ago, email or bring your last year tax return.
- Do not forget these important forms : W2, 1098-T, 1095-A, 1099-G, 1099-Consolidated, 1099-SSA or HSA
- Please check our website for all tax worksheets, organizers, and tax articles, service fees chart, and more.

Please call or text us to set appointment. **Don't request appointment by email**
Cell# (510)290-7043 or Alternate cell # (510)240-2215



TAX YEAR 20 _____

YOUR NAME _____ Cell # _____ Email _____

Any change from last year: (PLEASE CIRCLE)

Fill-in new information below

New Address ?	YES / NO	_____
Filing Status?	YES / NO	_____
Dependents?	YES / NO	_____
Bank /Account #?	YES / NO	_____

How many W2s you have ? # _____

Do you have tips or/and overtime income ? If yes, bring the last paystub if information not shown in W2.

How many income Forms 1099-NEC, 1099-MISC, 1099-R do you have ? # _____

If you have stock sales, have you received all forms 1099-Consolidated, or 1099-B _____ YES / NO

Do you have taxable incomes like UNEMPLOYMENT, CANCELED DEBT, WINNINGS? YES / NO

Do you have insurance under Covered-California in any month of the year ?(**Form 1095-A**) YES / NO

Do you or your dependents have any college tuition statements (**Bring Form 1098-T**) YES / NO

Do you pay for childcare? Have Care Provider's tax ID and amount _____ YES / NO

Do you have business or rental income ? Email me for organizing worksheets _____ YES / NO

Do you pay home property tax and mortgage interest ? YES / NO

Seventy five percent of taxpayers use STANDARD DEDUCTION. If you think you have tax benefit by ITEMIZED DEDUCTIONS, please bring the statements or provide the amounts you paid in the tax year:

PROPERTY TAX: \$ _____ MORTGAGE INTEREST:\$ _____, DMV FEES: \$ _____

DONATION: \$ _____ ANY OTHERS ? _____

ANY TAXABLE EVENTS like Solar installation, EV purchase, sales of properties ?

Son T. Le

📞 (510) 290-7043 | ✉ hisonle@gmail.com

📍 37481 Maple St. Ste H, Fremont CA 94536 | 🌐 www.fintaxadvantage.com