**Required details for Non-resident tax preparation**

**(Fill the info that applies to you)**

(Send your W2s, bank interest, any 1099, 1098 or tuition statement and a copy of last year tax return)

**Tax Payer First Name: Middle Name: Last Name:**

**SSN:**

**Date of Birth:**

**Occupation:**

**Current home Address:**

**Phone Number:**

**Email address:**

**Name of the Bank (within US) for Refund Direct Deposit or balance due:**

**Bank Routing Number: Account Number:**

**Account Type - Checking/Savings**

**Questionnaire:**

1. **Date you came to US first time?**
2. **Of What country were you a citizen or national during the tax year?**
3. **In what country did you claim residence for tax purposes during the tax year?**
4. **Have you ever applied to be a green card holder of the US?**
5. **Were you ever a US Citizen?**
6. **Were you ever a green card holder of US?**
7. **Your visa type on Dec.31st 2020. If you did not have a visa, enter your US immigration status on the last day of the tax year.**
8. **If your visa changed during 2020, Date of the change: Your previous visa type:**
9. **Days you are in US for past 3 years. Please list number of days separately.**
10. <http://www.timeanddate.com/date/duration.html>
11. **2018 2019 2020**
12. **If you travel out of US in 2020, please provide dates you entered and left during 2020:**
13. **Date out of USA: Date came back to USA:**
14. **Did you file a tax return last year?**
15. **If yes, what year and what form? (Is it 2018 or 19, what form – 1040 or 1040NR)**
16. **Your Passport Number:**
17. **Enter the name, address and telephone number of the academic institution during the year**
18. **Enter the name, address and telephone number of the Director of the academic or other specialized program you participated during the year**
19. **Type of visa (F, J, M or Q) you held during the past 5 years.**

**2016:**

**2017:**

**2018:**

**2019:**

**2020:**

**More details for some states: (Answer whatever you can)**

**Rent paid per year:**

**Health Insurance per year:**

**City and County, you lived:**

**School District:**

**If you lived in Multiple states in 2020 -**

**From and To Dates you stayed in each state**

**1.**

**2.**

**Required DRIVER’S LICENSE / STATE ID scanned copies for tax payer and spouse for e-filing. Tax returns without driver license can be e-filed but will take longer time to process. FYI.**

**NOTE: We prepare only Federal and State income tax returns. We do not prepare local/city taxes for most of the areas. You need to take care of city taxes by yourself.**

**Notes to tax preparer:**

