



WILL CHEN CPA PLLC
Certified Public Accountant
Integrity Independence Impact

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Dear Client:

Please bring following items for your individual income tax returns filing:

1. Current residential address, phone number, and email address
2. Prior year's Tax Returns if you have one;
3. Copy of all family members' ID and Social Security Card;
4. Checking or Saving Account number (VOID check) for IRS deposit (if refund) or withdrawal (if own tax)
5. Estimated taxes payments
6. All current year's income documents
 - a. W-2
 - b. W-2 G
 - c. 1099 Int
 - d. 1099 Misc
 - e. 1099 Div
 - f. C-business income and expenses
 - g. 1099-B capital gain and loss
 - h. 1099 R – retirement income
 - i. 1099 SSA – social security income
 - j. 1099 G – unemployment income
 - k. Rental & royalty income & expense
 - l. Sales of asset (ex: stocks, house, fixed asset)
 - m. Like-kind exchange
 - n. 1099C - cancellation of debt
 - o. Gift
7. Qualify expenses and adjustments
 - a. Educator expenses
 - b. Health saving account
 - c. Moving expenses (military only)
 - d. Self-employed health insurance deductions
 - e. Student loan interests
 - f. 1098-T Tuition fees
 - g. Medical and dental
 - h. Taxes paid (property tax and personal property tax)
 - i. Home mortgage interest & insurance premium
 - j. Investment interest
 - k. Gift to charity
 - l. Depreciation
 - m. IRA
 - n. Casualty
 - o. Gambling loss
 - p. Alimony (executed before 2019)
 - q. Child care expense (name, address & Tax ID)
8. 1095-A/1095-B/1095-C
9. Other items – consult your accountant
10. *American with oversea incomes*

Certified Public Accountant
Professional Limited Liability Company

- a. *Provide oversea income paperwork (pay stub, stock dividends, or company profit sharing, company information: name, tax ID, address)*
 - b. *Provide evidence of paying taxes to foreign government*
 - c. *For overseas real estate, provide property detail information and valuation reports, must be notarized*
 - d. *Oversea primary home do not need to be reported.*
 - e. *10% or more ownership of foreign company financial statements.*
 - f. *Foreign account (institution, address, max balance of the year, account number)*
 - g. *Gift*
11. *K1 tax form*
12. *Foreign owned company*
- a. *Name*
 - b. *Country*
 - c. *Date incorporated*
 - d. *Business activities*
 - e. *Functional currency*
 - f. *Title*
 - g. *Financial statements (income statement & balance sheet)*
 - h. *Share %*
 - i. *Address*
 - j. *Tax ID*
 - k. *Other owners' info (US person?)*
 - l. *Salary*
 - m. *Mention transition tax for new clients*
 - n. *Indebtedness between shareholder and company*