

Sky Capital Accounting Service Inc.

鑫盛会计师事务所

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2023 Tax Year Required Documentation

New Client

- 1 Copy of each family member's SSN
- 2 Copy of Birth Certificate of Dependence
- 3 The valid ID of taxpayer and spouse (Front & Back)
- 4 Letters from current school or primary doctor for each child
- 5 Proof of income* (see list below)
- 6 Proof of deduction* (see list below)
- 7 Address and phone number
- 8 Bank Account (copy of the void check)
- 9 copy of 2021 Tax return

***Proof of income**

- 1 Wage (W2)
- 2 Self-employment (1099-MISC)
- 3 Investment Income (1099-B)/Interest Income (1099-INT)/Dividend Income (1099-DIV)
- 4 Withdraw from IRA (1099-R)
- 5 Business/Partnership Income (K-1)
- 6 Gamble Income (W-2G)
- 7 Unemployment (1099-G)
- 8 Rental Income (including expense detail, such as mortgage 1098-M, property tax)
- 9 Insurance Coverage 1095-A/B/C
- 10 Withdraw from Health Savings Account (1099-SA)

***Proof of deduction**

- 1 Dependend Care(Valid Letter must include caregiver's name, address, phone number, tax ID, amount and covered period)
- 2 Tuition expense: 1098-T / 1098-E
- 3 Property Tax & Mortgage Interest :1098-Mortgage
- 4 Donation Letter with amount

Existing Client:

- 1 Birth Certificate of newborn child
- 2 Letters from current school or primary doctor for each child
- 3 Proof of income* (see list below)
- 4 Proof of deduction* (see list below)
- 5 Bank Account (copy of the void check)