

Evererst Associates, LLC		Basic Information	
QUESTIONER FOR TAX RETURN PREPARATION:	Tax Year: _____	LAST 4 DIGIT SSN: _____	
Name & Last four digit SSN: _____			
Filing Status - Please circle one of them:			
Single	Married	Head of household	Married filing seperately - if married need wife info.
(For HOH you must have dependents living with you at least half of the year or you bearing more than half cost of maintaing household)			
How many dependents(other than spouse): _____		Need name, date of birth & SSN or ITIN: _____	
Occupation: _____		Type of Visa: _____	
Are you working as consultant		Y	N
INCOME DETAIL:			
-Wages income - Need original or copy of all W2 - Provided/Attached		Y	N
-Interest or dividend income - need all copies or original of form 1099INT or 1099DIV or just a list shows Int/Div detail- amount		\$	
-FBAR: Do you have foreign accounts & maintaing more than US\$10,000 in accumulation at any time during		Y	N
the year If yes Must have to file form TDF90-22.1 OR 8938 (if over \$50,000): Any interest income on it		Y	N
Any tax withheld at source in foreign country , if yes claim it as foregin taxes paid		\$	
-Stocks Sales : Capital Gain or Losses - Need copy of form 1099B & Detail / summary of realized gain/(losses)		\$	
Detail/Summary of realized gain/(losses) for the year		Y	N
Any other Capital Gain/(losses) like house sale, business sale		Y	N
-Any self employment income - received form 1099MISC -PI see schedule C questioner		Y	N
-Did you engage in any business during the year - PI see schedule C questioner		Y	N
-Any Rental Income - PI see schedule E questioner		Y	N
-Any income reported on schedule K or K-1 for S corp or Partnership-attach schedules K or K1		Y	N
-Any Unemployment income for you or spouse- Need copy of 1099G		Y	N
-Any other Income - Gambling/Lottery winnings, Jury duty, Alimony received		Y	N
ADJUSTMENT DETAIL:			
-IRA Deduction/Contribution - Do you want to contribute in Traditional or Roth IRA-if not covered pension & 401K		\$	
-Eduction/Tuition deduction		\$	
-Moving Expenses(incurred for work & meet the distance test if your new job location is at least 50 miles		\$	
farther from your former home than your old main job location was from your former home) unreimbursed exp		\$	
-Interest paid on Student Loan over the year		\$	
-Health Saving Account deductions - Form 8917		\$	
-Dependent care expenses- Need day care name, address & taxID, only can claim if both taxpayers working or one is student		\$	
-Foreign tax credit paid on same income taxed in the USA included W2 or interest income		\$	

This will confirm that, I have reviewed my Form 1040 for tax year 2011 and schedules thereto, that all information set forth on the return was furnished by me and used by our tax preparer in the preparation of the return and that to the best of my knowledge and belief said return accurately reflects my income and expenses.

Signature _____