RCB Tax USA
Tax Division of RCB CPA PLLC
Year-Round Tax Services

Year-Round Address: Hicksville, New York 11802
Phone: 800-767-8710 (Voice Mail) • www.RCB-TAX-USA.com
Email: RCB.TAX.USA@Gmail.Com

Tax Year: Select Year
Please Select The Tax Year

Non-Resident 1040-NR

Dear Client,

Non-Resident (1040-NR)

Client Name: _____ Cell Phone Number: _____
(Per Social Security Card: Last / First / Middle) **XXX-XXX-XXXX**

New / Last Year Returning Client (LYRC): _____ Today's Date: _____
MM/DD/ YYYY

Only Last Year (LY) NR Returning As Current Year (CY) NR then "LYRC"
But, If LY R and NR in CY, then select and submit as "NEW"

New Client Social Security Number (SSN): _____ New Client Date of Birth: _____
XXX-XX-XXXX **MM/DD/ YYYY**

Personal Email Address: _____

e.g. Gmail, Hotmail, Yahoo etc. used in TRE 1.

Thanks for entrusting your tax returns preparation work to us.

In order to help you provide your complete and correct tax information, please complete and return by email, the enclosed **1st** Single PDF portfolio of **NINE** PDFs (**TENTH PDF for Notes & Info)**, and attach **2nd** Single PDF of your non-returnable scanned copies/photocopies (NO ORIGINALS) of all your relevant tax documents.

(1) Tax Return/s Engagement Letter – TREL – 5 Pages

All Clients: Please write your name on page 1, read pages 1 to 5 and sign & date on the last page 5.

(2) Tax Return Essentials I (TRE-I) – 9 Pages

New Clients: Please complete all the 9 pages. **Please attach copies of social security card/s &/or ITIN Letter/s of the Tax Payer and all family members to be shown in the tax return**.

Returning Clients: Please complete pages 1 & 2 up to the **"blue star symbol"**. Use pages 3 to 9, as applicable, only if your **LY** information has changed, to report those changes. **Please attach copies of social security card/s &/or ITIN Letter/s of the Tax Payer and all family members to be shown in the tax return**.

(3) Tax Return Essentials II (TRE–II) – 3 Pages

(4) Tax Return Essential III (TRE-III) – Digital Assets (Virtual / Crypto Currency) Declaration – 2 Pages

(5) NR 05 NR USA State Photo ID Verification (Taxpayer) – 1 Page

(6) NR 06 NR Form 1040 Schedule B Part III - Foreign Financial Accounts & Trusts Declaration (Taxpayer) – 1 Page

(7) NR 07 NR Form 1040 NR Sch OI (Taxpayer) – 2 Pages

(8) NR 08 – Reserved For Future Use – 1 Page

(9) New York State Income Tax Reporting – 4 Pages

(10) Notes & Info (Only FYI) – 3 Pages

Note: If you need to make copy and/or print only one or more of the selected templates from the above, please follow these steps:

1) Go to Adobe Acrobat
2) File/Open Tax Organizer PDF Portfolio
3) File
4) Extract Required Template file from PDF Portfolio

CTY = Current Tax Year **LY = Last Year** **TP = Tax Payer** **SP = Spouse**

ALERT: Please file on your own separately Informational Tax Returns e.g., IRS Form 8843 or similar Tax Forms.

Thank you.

Sincerely,
RCB TAX USA
Tax Division of RCB CPA PLLC

Email: **RCB.TAX.USA@GMAIL.COM**

Website: **WWW.RCB-TAX-USA.COM**

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