



客戶問卷調查信息表
Tax-Aid Questionnaire

CHINESE / ENGLISH

Tax-Aid Use Only

Volunteer Screener Name: _____

Volunteer Station: _____

Return Level (circle one): 1, 2 or 3

Site Manager circle one: Efile or Paper

Filing Status: S | MFJ | HOH | QS

Client #: _____

Preferred Language: _____

Entered into Tax-Aid client tracker? Y/N

说明指南: 請填寫 1-13 頁並返還給 Tax-Aid

Instructions: Complete pages 1-13 and return to Tax-Aid

圈出适用的税务年份

Tax Year(s) Circle all that apply.

2023, 2022, 2021, 2020, 2019, 2018, 2017.

其他年份, 填在这里

For additional years, enter here: _____

第1部分: 你的信息: (請對以下的問題圈出"是"或"否")

Part 1: Your Information: Please Check Your Answers to Yes/No Questions

你去年报税了吗? Did you file your tax return last year?	是/Yes	否/No
Tax-Aid有幫助你準備去年的報稅嗎? Did Tax-Aid prepare your taxes?	是/Yes	否/No
你今年是否已完成報稅? Have you already filed a tax return this year?	是/Yes	否/No
你或你的配偶有沒有收到国税局或州税局的信件? Have you or your spouse received any letters from the IRS or State FTB?	是/Yes	否/No

納稅人姓名/ **Taxpayer's name**

你的名字/First _____ 中間名縮寫/Middle _____ 姓氏/Last _____

配偶名字/**Spouse's name**

你的名字/First _____ 中間名縮寫/Middle _____ 姓氏/Last _____

个人信息/Personal Information	纳税人 Taxpayer	配偶 Spouse
社会安全號碼 Social Security Number		
你有 ITIN 號嗎? If you have an Individual Identification Number (ITIN), please list it / 请填写		
电话号码 Cell Phone Number		

个人信息/Personal Information	纳税人 Taxpayer	配偶 Spouse
出生日期(月/日/年) Birth Date (Month/Day/Year)	__/__/__	__/__/__
你是否為美國公民? Are you a U.S. citizen? <input type="checkbox"/> 如果你是入籍, 请勾选此框 Check the box if naturalized	是/Yes 否/No	是/Yes 否/No
你是否為全職學生? Are you a full-time student?	是/Yes 否/No	是/Yes 否/No
你是否在其他報稅表 上被列為親屬, 例如列入你父母的表? Are you claimed as a dependent on another person's tax return such as your parent?	是/Yes 否/No	是/Yes 否/No
你是否法定失明? Are you legally blind?	是/Yes 否/No	是/Yes 否/No
去年起, 你是否為永久殘障? Last year, were you permanently disabled?	是/Yes 否/No	是/Yes 否/No
你的家庭电话号码 Home Phone		
你的电子邮件 Email Address		
家庭地址 , 公寓 # Home address , Apt./Unit		
城市、州名、邮政编码#、City, State, Zip Code,		

就业信息 Employment Information	纳税人 Taxpayer	配偶 Spouse
你的工作/职务是什么? What is your job?		
雇主名称 Your employer		
雇主地址 Your employer's address		
你在那里工作多久了? How long have you worked there?		
你的雇主是怎么付工资给你的?(每月, 每周, 现金) How are you paid (monthly, weekly, cash)?		

第2部分- 你用何種身份報稅? / Part 2 – How are you filing?

單身(包括已註冊的伴侶關係或州法承認的其他正式關係)

Single (including registered domestic partnerships, civil unions, or other formal relationships under state law)

已婚, 但分開報稅 / Married filing separately ²

最終離婚判決書日期, 或分居扶養協議日期 _____

⇒ Date of final decree or separate maintenance agreement

已婚, 共同報稅 / Married filing jointly

否婚姻是否被你所報稅的州承認?

⇒ Was your marriage recognized under state law for the state(s) you are filing in? 是/Yes 否/No

你在2022年結婚了嗎? / ⇒ Did you get married in 2022

是/Yes 否/No

單身, 但有撫養其他人 / Head of Household

是/Yes 否/No

在過去6個月, 你的配偶曾否與你同住?

Did your spouse live with you during any part of the last six months of the tax year?

是/Yes 否/No

有受撫養子女的合格鰥夫

是/Yes 否/No

Qualifying Widow(er) With Dependent Child

配偶死亡年份 _____

Year of spouse's death

如果你 / 你的配偶是身份盗窃的受害者, 并从国税局获得了电子申请PIN 码, 那么 PIN 码是什么?

If you/your spouse were a victim(s) of identity theft and received an e-filing PIN from the IRS, what is the PIN?

電子申請 PIN/E-Filing PIN	納稅人 Taxpayer	配偶 Spouse
身份保護 PIN 碼 / IP PIN #		
身份證明種類 / Type of ID		
身份證明號碼ID #: ID #		
頒發州/State ID issued		
頒發日期/ Issue date		
失效日期/Expiration date		

收到退稅的最快方式是通過直接存款。如果你希望直接存款用於退稅, 請在下方列出你的銀行信息。

The fastest way to receive your tax refund is by Direct Deposit. If you want Direct Deposit for your tax refund, list your banking information below.

銀行名稱/Bank name: _____

匯款路線號碼 / Routing number : _____

銀行帳號 / Account number : _____

帳戶類型/Type of account 支票帳戶活期/ Checking 儲蓄帳戶/ Savings

第 3 部分 受养人/Part 3 Dependents

你或你的配偶是否曾經領養過小孩?/Have you or your spouse adopted a child? 是/Yes 否/No

被撫養 人的名字 (名, 中間名縮寫, 姓氏) Dependent's Full Name (First, Middle Initial, Last)	出生日期 Date of Birth (mm/dd/yy)	美国公民 (是/否) US Citizen	去年居住在美国、加拿大或墨西哥(是/否) Lived in US/Canada/Mexico last year	社会保障号 Social Security Number or ITIN	与纳税人同住的月数 # months lived with payer	是否為全職 学生? Full time student?	與你的關係 (儿子, 女儿, etc.) Relations hip (son, daughter, etc.)	永久残疾? Totally and permanently disabled
		是/Yes 否/No	是/Yes 否/No			是/Yes 否/No		是/Yes 否/No
		是/Yes 否/No	是/Yes 否/No			是/Yes 否/No		是/Yes 否/No
		是/Yes 否/No	是/Yes 否/No			是/Yes 否/No		是/Yes 否/No
		是/Yes 否/No	是/Yes 否/No			是/Yes 否/No		是/Yes 否/No
		是/Yes 否/No	是/Yes 否/No			是/Yes 否/No		是/Yes 否/No

第 4 部分 - 去年, 你、你的配偶或你所有的受抚养人是否.....

Part 4 - Did You or Your Spouse or Your Dependent.....

1. 你、你的配偶和所有受抚养人是否有全年的健康保险? Do you, your spouse and your dependent have health insurance for the whole year?	是/Yes 否/No
2. 你有没有收到此类表格? Did you receive one or more of the following forms? (please check the boxes) (勾选方框) <input type="checkbox"/> 1095-B <input type="checkbox"/> 1095-C	是/Yes 否/No
3. 你有没有通过市场(交易所)或加州 3895 表格获得保障? Did you purchase your insurance from the Marketplace or receive Form 1095-a and California Form 3895? a. 如果是, 你有没有请从 Marketplace 收到预付款以帮助支付你的月度费用 If yes, did you receive an advanced payment from Marketplace to help to pay your monthly premium b. 如果是, 你的 1095-A 表格中列出的每个人是否都在此纳税申报表中申报? If yes, is everyone listed in your Form 1095-A reported in this tax return?	是/Yes 否/No 是/Yes 否/No 是/Yes 否/No 是/Yes 否/No
4. 有 Marketplace 授予的豁免吗? 請列出原因 Do you have an exemption from the Marketplace? List Reason_____?	

第 4 部分-你或你的配偶是否收到... ?/

Part 4 A - Did You or Your Spouse Receive...?

<p>1. 工資 (W-2) Wages (W-2)</p> <p>1a. 圈出你收到的 W2 数量: 一到五个, 六个或更多 Circle the number W2s you have 1-5 6 or more²/或更多</p>	<p>是/Yes 否/No</p>
<p>2. 小費 / Tips</p> <p>如果是, 你收到了多少钱? _____ If yes, how much did you receive?</p>	<p>是/Yes 否/No</p>
<p>3. 奖学金 (1098-T) Scholarships² (1098-T)</p>	<p>是/Yes 否/No</p>
<p>4. 银行利息 / 股票利息 (1099-INT, 1099-DIV) Interest/dividends² (1099-INT, 1099-DIV)</p>	<p>是/Yes 否/No</p>
<p>5. 州退税 (1099-G) State/local tax refund (1099-G)</p>	<p>是/Yes 否/No</p>
<p>6. 赡养费或单独支付维护费用收入 Alimony income or separate maintenance payments</p>	<p>是/Yes 否/No</p>
<p>7. 现金或自雇收入 (1099-MISC, ; 1099-NEC; Cash) Self-employment income (1099-MISC,; 1099-NEC; Cash)</p>	<p>是/Yes 否/No</p>
<p>8. 工作收入没有申报在 W-2/1099 Income for work not reported² on Forms W-2/1099</p>	<p>是/Yes 否/No</p>
<p>9. 你收到 1099-K 以换取你提供的任何服务和商品吗? Did you receive 1099-K in exchange for performing any services and goods?</p>	<p>是/Yes 否/No</p>
<p>9a. 你为什么收到 1099-K? Why did you receive 1099-K? _____</p>	
<p>10. 你在加州以外赚取收入吗? Did you earn income outside California?</p>	<p>是/Yes 否/No</p>
<p>11. 買賣股票/ 債券/ 房地產(1099-S, 1099-B) Transactions of stocks² /bonds /real estate(1099-S, 1099-B)</p>	<p>是/Yes 否/No</p>
<p>12. 殘障收入保險賠款/職業傷害賠償 Disability income² (insurance/workers comp) (Forms 1099 R, W-2)</p>	<p>是/Yes 否/No</p>
<p>13. 養老金/退休金/年金/個人退休帳戶提款(1099-R) Pension²,annuity, IRA distributions (1099-R)</p>	<p>是/Yes 否/No</p>

14. 你是否因為疫情從養老基金取出資金? Did you withdraw from your IRA ² or other retirement accounts due to Covid-19?	是/Yes 否/No
15. 失業救濟金 (Form 1099-G) Unemployment compensation(Form 1099-G)	是/Yes 否/No
16. 社會安全福利金/鐵路退休員工福利金 (SSA-1099, RRB-1099) Social Security, Railroad (SSA-1099, RRB-1099)	是/Yes 否/No
17. 物業出租盈利或虧損 Income (or loss) from rental property	是/Yes 否/No
18. 其他收入(博彩/彩票, 獎品獎項, 陪審團職責, 時間表 K-1 等) Other income ² (gambling/lottery, prizes/awards, jury duty, Schedule K-1, etc.)	是/Yes 否/No
19. 你是否在2022 年有購買或拋售任何加密貨幣(例如比特幣)? Have you purchased and/or sold any cryptocurrency ³ (example bitcoin) (Check the box/勾选方框) <input type="checkbox"/> Sold cryptocurrency /出售加密货币 <input type="checkbox"/> Purchased cryptocurrency /购买加密货币	是/Yes 否/No
20. 你是否在 2022年收到任何加密貨幣(例如比特幣)以換取任何服務? Have you received any cryptocurrency ³ (example, bitcoin) in exchange for performing any services?	是/Yes 否/No
21. 你是否收到預付兒童稅收抵免款項? Did you receive the Advance Child Tax Credit payments? How much did you receive/ 你收到了多少? _____	是/Yes 否/No
22. 你是否年齡在18到24歲之間? 你是否參加過寄養青年計劃? Are between the ages of 18-24 years old? Were you a part of the Foster Youth Program?	是/Yes 否/No 是/Yes 否/No

第 4B 部分-你或你的配偶是否付款...?
Part 4B - Did You or Your Spouse Pay...?

1. 租金 Rent	是/Yes 否/No
2. 你所租住的住處是否被定為政府協助類的房屋? Was your home rental considered subsidized housing?	是/Yes 否/No
3. 贍養費或單獨支付維護費用 Alimony or separate maintenance payments	是/Yes 否/No
4. 退休戶口供款 Contributions to a retirement ² account	是/Yes 否/No
5. 高等學院學費 (1098-T) Post-secondary education ² expenses	是/Yes 否/No
6. 自付醫療費用 Medical ² expenses	是/Yes 否/No
7. 房屋貸款利息 (1098) Home mortgage ³ interest (1098)	是/Yes 否/No
8. 學生貸款利息 (Form 1098-E) Student ² loan interest (Form 1098-E)	是/Yes 否/No
9. 物業稅 / 個人資產稅 (1098) Real estate ² taxes or personal property taxes (1098)	是/Yes 否/No
10. 慈善捐款 Charitable contributions 10a. Amount of contributions/捐款金額 \$_____	是/Yes 否/No
10b. 你所付的資金形式是什麼? (圈出所有適用的項目) How was this contribution made (circle all that apply) Cash (現金) / Check (支票) / Credit Card (信用卡)	
11. 日間托兒費 Child or dependent care expenses ² such as daycare	是/Yes 否/No
12. 教師的教育用品支出 For supplies as an educator (i.e., teacher, teacher's aide, counselor, etc.)	是/Yes 否/No
13. 與自雇收入 / 其他收入相關的支出 Expenses related to self-employment ² income or any other income you received Circle the number of expenses you had / 圈出你的支出數量 1-5/一到五個, 6-9 ² /六個到九個, more than 10 ³ /十個或更多 ⁽³⁾ 請參共享經濟"費用": https://tinyurl.com/4sujn3je	是/Yes 否/No

第 4C 部分- 你有没有...
Part 4C - Did you have...

<p>1. 保健储蓄账户(5498-SA, 1099-SA) Health² Savings Account (5498-SA, 1099-SA, W2 with Code W in box 12)</p>	<p>是/Yes 否/No</p>
<p>2. 債務取消/赦免(1099-C, 1099-A) Have debt cancelled²/forgiven/credit card/mortgage(1099-C, 1099-A)</p>	<p>是/Yes 否/No</p>
<p>3. 買/賣/法拍你的物業(Form 1099-A) Buy, sell, foreclose (COD) your home²(1099-A)</p>	<p>是/Yes 否/No</p>
<p>4. 前一年是否不允許獲得收入抵免(EIC)或兒童稅收抵免(CTC)? Has Earned Income Credit (EIC) or Child Tax Credit (CTC) disallowed a prior year²? 哪一年你是否收到預付兒童稅收抵免? _____ Which year?</p>	<p>是/Yes 否/No</p>
<p>5. 裝高效節能家用物品(如窗戶等) Purchase/install energy-efficient home items² (such as windows, etc.) 你付了多少钱? _____ How much did you pay?</p>	<p>是/Yes 否/No</p>
<p>6. 你是否生活在受自然災害的地 Live in an area that was affected by a natural disaster? 6a. 如是, 則哪裡? _____ If so where?</p>	<p>是/Yes 否/No</p>
<p>7. 年的預估納稅額你支付了多少? 2023? Estimated² tax payments for 2023? 你付了多少钱4/15? _____ How much did you pay 4/15? _____ 你付了多少钱6/15? _____ How much did you pay 6/15? _____ 你付了多少钱9/15? _____ How much did you pay 9/15? _____ 你付了多少钱1/15? _____ How much did you pay 1/15? _____</p>	<p>是/Yes 否/No</p>
<p>8. 你是否有"資本損失結轉"(F1040 附表 D)³ A "capital loss carryover" (on Form 1040 Schedule D)³</p>	<p>是/Yes 否/No</p>
<p>9. 將去年的退稅用於支付今年的稅款 Apply last year's refund to this year's taxes²</p>	<p>是/Yes 否/No</p>
<p>10. 在 2008 年獲得首次購房者信貸? Did you receive First Time Homebuyers Credit in 2008?</p>	<p>是/Yes 否/No</p>

Tax-Aid透過補助金和捐款來經營我們免費的稅收據點。以下選項將會被用於申請補助金和做為統計目的。

Tax-Aid depends on grants and contributions to operate our free tax sites. The data from the following optional questions may be used to apply for these grants and for statistical purposes.

1. 種族 / Ethnicity: 請選擇所有適用選項 / check all that apply:

- | | |
|------------------------------------|---|
| <input type="checkbox"/> 非裔 美國人/黑人 | <input type="checkbox"/> African American/Black |
| <input type="checkbox"/> 拉丁裔 | <input type="checkbox"/> Latinx |
| <input type="checkbox"/> 亞洲人 | <input type="checkbox"/> Asian |
| <input type="checkbox"/> 美國原住民 | <input type="checkbox"/> Native American |
| <input type="checkbox"/> 白人 | <input type="checkbox"/> Caucasian/White |
| <input type="checkbox"/> 夏威夷原住 | <input type="checkbox"/> Native Hawaiian/Pacific Islander |
| <input type="checkbox"/> 其他: _____ | <input type="checkbox"/> Other |
| <input type="checkbox"/> 宁愿不回答 | <input type="checkbox"/> Prefer not to answer |

2. 你的性別是? (請選擇最能描述你當前性別身份的選項)

What is your gender? (Check the one that best describes your current gender identity)

- | | |
|-----------------------------------|---|
| <input type="checkbox"/> 女人 | <input type="checkbox"/> Female |
| <input type="checkbox"/> 男人 | <input type="checkbox"/> Male |
| <input type="checkbox"/> 变性女人 | <input type="checkbox"/> Transgender Female |
| <input type="checkbox"/> 变性男人 | <input type="checkbox"/> Transgender Male |
| <input type="checkbox"/> 性別酷兒 | <input type="checkbox"/> Gender Queer |
| <input type="checkbox"/> 其他 _____ | <input type="checkbox"/> Other |
| <input type="checkbox"/> 不方便回應 | <input type="checkbox"/> Prefer not to answer |

3. 你或你的任何家庭成員有殘疾嗎?

Do you or any member of your household have a disability?

是/Yes 否/No
不方便回應
Prefer not to answer

4. 你或你的配偶是美國的退伍軍人嗎?

Are you or your spouse a Veteran from the U.S. Armed Forces

是/Yes 否/No
不方便回應
Prefer not to answer

5. 你是怎麼知道我們的？ / How did you hear about us?

Tax-Aid 做了我之前的回報
Tax-Aid did my return before

是/Yes 否/No

互聯網搜索
Internet search

是/Yes 否/No

另一個非營利組織
Another nonprofit

是/Yes 否/No

家人或朋友
Family or friend

是/Yes 否/No

其他(請填寫) _____
Other (please write in)

INCOME SUMMARY			
FOR TAX AID USE ONLY			
Taxable Income		Non-Taxable Income	
Wages (W-2/1099)		SSA/SSI	
Interest/Dividends		AFDC	
Schedule C		Gen. Asst	
IRA/401(k)/Pension		Other	
TOTAL INCOME			
Is the taxpayer below our \$64,000 gross income (taxable) requirement?		Yes/是 No/否	
Does the taxpayer NEED to file a return?		Yes/是 No/否	
Withholding		Earned Income Credit	
Estimated Tax Payments		Renter's Credit	
Direct Deposit Verified		Client Renumbered?	
EFile?		Critical Diagnostics cleared?	
ERO PIN? Yes / No			



信息披露協議

我們不會泄露或使用你的個人身份信息，包括社會安全號碼，ITIN(納稅者身份號)，出生日期，報稅信息 或 其他個人財務信息。我們將只使用你的聯絡信息，用于通知你其他可能使你受益的服務。你的信息只将与数千名 从我们这里得到服务的报税人的信息汇总在一起，汇总信息将以如下形式出现在各种可能的共享场合：

Tax-Aid 2023 Results
3,181 tax returns
\$1,615,106 million in total refunds

以下人士、團體或組織可能獲得汇总數據：

- ☐ 免費稅務籌劃方案的捐助者和志願者
- ☐ 若干媒體合作夥伴
- ☐ 民選官員和其他組織的支持者
- ☐ 一般民眾

披露信息授权

按聯邦法律的規定，我們應向你提供此授权表格。除非得到法律的授權，未經你的同意，我們不能將你的報稅信息 向与报税无关的第三方披露。如果你授权披露你的報稅信息，聯邦法律將不再保護你的報稅信息免于被 进 步 使用 或扩散。你并不是必須填寫此表格。如果你的簽字授权是有条件的，那么授权将被视为無效。你可以指定授权的有效期，如果你不指定時間，那么有效期將被默认为 年 。如果你認為，在未經法律授权也 未經你授权的情況下，你的報稅信息被泄露或被不正当地使用了，你可以考虑通过電話或電子郵件聯繫財政部稅務總局監察長(TIGTA)，電話：1866-366-4484，電子郵件：complaints@tigta.treas.gov

- 是的，我同意我的報稅信息与上述人士、團體或組織共享
- 不，我不同意我的報稅信息与上述人士、團體或組織共享 organizations

姓名 日期 _____

簽名 配偶簽名 _____

注：此文件为翻译件，若出现歧义，请以原文为准。_____

Taxpayer Agreement to Disclose



We **will not** share or use personal identifying information including your social security number, ITIN, date of birth, refunds, or personal financial information. We will only use your contact information to inform you of other services that may benefit you. We will use and keep your data combined with THOUSANDS of other taxpayers for the duration of the free tax preparation program to share results like this:

Tax-Aid 2023 Results
3,181 tax returns
\$1,615,106 million in total refunds

The following persons, groups, or organizations receive the combined data results:

- Free tax preparation program donors and volunteers
- Various media partners
- Elected officials and other program supporters
- General public

Consent to Disclose

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution. You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year. If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

- Yes, I agree to share my tax return information with the above persons, groups or organizations
- No, I do not agree to share my tax return information with the above persons, groups, or organizations

Signature _____

Spouse's Signature _____

Date _____



事实真相	税务援助如何处理你的个人资料信息？
为啥？	美國聯邦法律提供消費者一些(但不是全部)權益來限制個人資料信息分享相關的機構決策。美國聯邦法律同時規定我們告知個人信息的收集, 分享方式以及保護措施。請諮詢閱讀此聲明來更好地瞭解我們的政策。
什么？	我們收集的非公開資料信息都會是你個人提供的或者經你許可之後所收集。我們所收集並分享的資料信息類別將會根據你 所需要的具體服務。這些資料信息包括： 姓名； 社會安全號碼； 個人報稅識別號碼； 住址； 出生日期； 銀行賬戶號碼； 就業單位資料信息； 收入與開銷； 家庭成員的姓名, 出生日期, 社會安全號碼與收入。 聯係方式(電話號碼與郵件地址)
怎么样？	會計類服務公司的日常業務需要顧客個人信息。此下我們會詳細解作為會計公司, 我們機構分享個人資料信息的原因, 以及你是否可以限制此類資料信息分享。如果你不再是我們的顧客, 我們可以按照此聲明持續分享你的資料信息。

我们可以分享你的个人资料信息的原因	税收援助分享担吗？	你能限制这种分享吗？
我們日常的業務用途— 例如, 報稅 流程所需, 賬戶信息所需, 法令與其他法律調 所查 需 , 或是給信用社的報告。	是	否
給我們內部的營銷— 爲了給你提供我們的服務	否	我们不分享
給聯合營銷的其他公司	否	我们不分享
給非附屬公司(定義在下方)的營銷	否	我们不分享

如有问题？	你可以電話聯係 415-229-9240 或郵件 admin@tax-aid.org
-------	--

我们是谁？	
谁提供此通知？	Tax-Aid
我们要做什么？	
Tax-Aid 如何保护我的个人信息？	爲了保護你的個人信息並防止未經贖權的使用，我們使用符合聯邦法律規定的網絡 與系統安全機制，包括實體，電子以及程序化措施。
Tax-Aid 如何收集我的个人信息？	我們會在以下情況下收集你的個人資料信息： <ul style="list-style-type: none"> • 提交報稅申請，文件； • 提交問題與其他交流； • 與我們的報稅人員合作。
为什么我不能限制所有共享？	美國聯邦法律只給予消費者權益限制機構與其他非附屬公司利用信息分享對消費者 進行營銷，具體州法律與公司政策可能給你額外資料信息分享的限制權利。
定义	
非附属机构	無共同所有權或掌控權的公司，無論金融公司與否。
联合市场推广	非附屬公司之間有關於營銷產品和服務的正式合作。Tax-Aid 不進行聯合營銷。
其他重要资料	
N/A	

TAX-AID

CLIENT PRIVACY NOTICE

FACTS	WHAT DOES TAX-AID DO WITH YOUR PERSONAL INFORMATION?
WHY?	U.S. federal law provides clients with the right to limit some but not all of a company's decisions with respect to the sharing of the client's personal information. U.S. federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.
WHAT?	We collect nonpublic personal information about you that is either provided by you or obtained by us with your authorization. The types of personal information we collect and share depend on the particular service that we provide to you. This information can include your: name; Social Security number; Individual Taxpayer Identification Number; address; date of birth; bank account information; employment details; earnings and expenses; family members' names, dates of birth, Social Security numbers and earnings (if any); and contact information (phone number and email address).
HOW?	Accounting service companies need to share their clients' personal information to run their everyday business. In the section below, we list the reasons accounting service companies can share their clients' personal information, the reasons Tax-Aid chooses to share some of this information and whether you can limit this sharing. Once you are no longer our client, we can continue to share your information as described in this notice.

Reasons we can share your personal information	Does Tax-Aid share?	Can you limit this sharing?
For our everyday business purposes— such as to process your tax filings, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes— to offer our services to you	No	We don't share
For joint marketing with other companies	No	We don't share
For Nonaffiliates (defined below) to market to you	No	We don't share

QUESTIONS?	Call us at 415-229-9240 or email us at admin@tax-aid.org
-------------------	---

Who we are	
Who is providing this notice?	Tax-Aid
What we do	
How does Tax-Aid protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include physical, electronic and procedural safeguards.
How does Tax-Aid collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> • submit your tax documents to us; • contact us with questions; and • work with one of our tax professionals to prepare your taxes.
Why can't I limit all sharing?	U.S. federal law gives you the right to limit only our sharing to Nonaffiliates to market to you. State laws and individual companies may give you additional rights to limit sharing.
Definitions	
Nonaffiliates	Companies not related by common ownership or control. Such companies can be financial and nonfinancial companies.
Joint marketing	A formal agreement between non affiliated companies that together market products or services to you. Tax-Aid does not jointly market.
Other important information	
N/A	