



## AirlineTaxes.com

Rose Tax & Financial  
605 Edwards Avenue  
West Dundee, IL 60118  
**airlinetaxes@gmail.com**  
ph. (847) 715-8930  
fax (815) 301-2671

Greetings!

We hope you had a great experience with us last tax season and we look forward to working with you again this year.

The IRS has set forth new regulations on how we send documents back and forth with our clients. We now have an encrypted portal for you to send us your documents. It's very easy to use. You'll use it to pay your invoice and once your return is complete we will upload it to the portal and you will have access to it 24/7 (so you'll always have a copy of your tax return just a few clicks away).

All efile authorizations will now be e-signed through the portal so you never need to send us signed documents through the mail. If you still wish to receive a printed copy of your tax return in the folder \$10 will be added to your fee. There is a checkbox on the Recurring Client Form to indicate that you would like everything printed and mailed.

1. Please read these forms carefully and fill out anything that pertains to you. Sign the Recurring Client Form,
2. Scan all of your documents into 1 PDF and upload it to the portal, **or** make photocopies of your tax documents (no receipts) and send them through the mail.

The Flight Calendar is the best way to keep track of your overnights for the whole year. (United Crew— this doesn't apply to you). Then you will only have one sheet to send us instead of a whole report. However, keep the reports in your files in case you ever need to prove your layovers.

We are also here for your financial planning needs. Do you have an old 401k to rollover? Want to start an IRA or just get an idea of how your finances are looking for the long-term? We are working with a fabulous brokerage and have access to almost any product line out there – annuities, life insurance, long-term care insurance, Roth IRAs, etc.

### **Please do not send:**

- Receipts (please total your receipts – including charity receipts/letters - and put the amounts on the worksheets)
- Monthly Paystubs (if you'd like to send the last one of the year that's fine, but don't send more than one),
- Checkbooks, or any originals you would need as part of your records
- Your own Excel spreadsheets. If you are self-employed or a landlord please use your spreadsheets to fill out our worksheet (either the self-employed worksheet or the rental expense and income worksheet – available at [airlinetaxes.com](http://airlinetaxes.com)).

Call or email if you need any help. We're here year-round. Thank you for using AirlineTaxes.com.

*Jenya Rose & Tim Walsh*

By submitting your tax information to Airline Taxes.com, you are agreeing to the terms of service and fees. Your fee will not be taken out of your refund. The fee is due at the time service is performed and before the amount of your refund or liability is given to you. You may pay by credit card, check or Paypal. You are responsible for the cost associated with the services provided. Should you wish to terminate services after the work has been performed, payment is due for time spent working on your return in full at time of termination and prior to return of documentation.

**Recurring Client Form** Please fill out any field that applies to you and sign the bottom of page 2. Let us know if you need any help filling this out. Call or email anytime. ☺.

Name	
Only fill out the fields in this section if different from last year:	
Occupation	
Cell Phone	
Alt. Phone	
Email	
New Address?	

Did you get married?	
Spouse Name	
Social Security #	
Birthdate	
Occupation	
Cell Phone	
Alt. Phone	
Email	

- Single;                                    Lived separate from spouse for last 6 months of year or more                                    Head of Household (unmarried with dependent(s) in the house)  
 Married filing Joint                                    Divorced during the tax year                                    Widowed during the tax year.  
 Married but filing Separate Give spouse Name/SSN/birthdate above                                   Date: \_\_\_\_\_

New Dependent?	Name	Social Security #	Date of Birth	Relationship	Lived with you all year?

Had health insurance the whole year.  Bought it on the ACA marketplace/exchange – If so, we need form 1095-A

Did not have health insurance for these months: \_\_\_\_\_

Spent \$ \_\_\_\_\_ on childcare while working/school full-time: Provider: \_\_\_\_\_; SSN/EIN: \_\_\_\_\_ Address \_\_\_\_\_

Spent \$ \_\_\_\_\_ this year on higher education (Include 1098-T from the college with your documents). It was for  
 Undergraduate,  Graduate - for  Me,  My Spouse,  My Dependent (s);  
 which dependent(s)? \_\_\_\_\_

I am an IL resident that spent money on K-12 education-related items. Please note which child, name of school, grade, and how much you spent (tuition, registration fees, lab fees, musical instrument rental from the school).

Moved: Date: \_\_\_/\_\_\_/\_\_\_ from (city, State): \_\_\_\_\_ to (city, ST): \_\_\_\_\_. Spent \$ \_\_\_\_\_ on moving/storage & \$ \_\_\_\_\_ on travel/lodging.  Moved 50 miles closer to work;  Changed workplace/base;  Temporary Assignment

I have over \$10,000 in a foreign bank account. If so, ask us for the FBAR worksheet (or download it from our website).

Made  Traditional IRA, or  Roth contributions, not through my job.  For myself \$ \_\_\_\_\_,  Spouse \$ \_\_\_\_\_

I have an old 401k from a previous job and would like to know the benefits of rolling it over into an IRA.

Bought a car/boat, RV, large purchase. The sales tax was \$ \_\_\_\_\_;

The tax deductible portion of my annual car registration amount (called ad valorem on the bill) is: \$ \_\_\_\_\_ (not deductible in IL or other states that use a flat tax)

Donated money to charity: total amount: \$ \_\_\_\_\_,  I pay \$ \_\_\_\_\_ each year for my safe deposit box,

Donated items to charity: estimated value: \$ \_\_\_\_\_, If over \$500 worth of items donated we'll need to know:  
 Which Charity? \_\_\_\_\_, What kind of items?  Clothing,  Furniture,  Household items,  other: \_\_\_\_\_

Spent \$ \_\_\_\_\_ out of pocket on medical - Include long term care premiums paid after tax (not pre-tax).

- Health insurance premiums I paid out of pocket (not paid by my employer) \$ \_\_\_\_\_.
- Drove \_\_\_\_\_ miles doing volunteer work for a 501c3 charity.  Drove \_\_\_\_\_ miles for doctor visits.
- Sent in quarterly Estimated Taxes: Dates & amounts: \_\_\_\_\_
- Deposit my refund directly into same account as last year, ending in these 4 digits \_\_\_\_\_. If new account:  
 Bank Name \_\_\_\_\_, Routing # (9 digits) \_\_\_\_\_, Account# \_\_\_\_\_

**Remember to send/bring these items (if they apply to you):**

- ◆ W-2(s) from your employer(s),
- ◆ 1099-MISC forms for self-employment income,
- ◆ 1099-INT (interest) and 1099-DIV (dividends),
- ◆ 1098 Mortgage Interest Statement,
- ◆ Property Tax bill (if not escrowed in mortgage),
- ◆ 1098-E Student Loan Interest Statement
- ◆ 1098-T College or Graduate School Statement
- ◆ 1099-SSA form showing Social Security received,
- ◆ 1099-B forms for brokerage trades: stocks/bonds,
- ◆ K-1 forms from partnership, Corp., or trust,
- ◆ 1095-A for health insurance bought on exchange
- ◆ 1099 SSA if you have HSA Health Savings Account
- ◆ Bought a new house: HUD statement (3 pages)

Did anything else happen this year that might influence your taxes? (continue on back or separate sheet)  
 These might include – received or paid alimony, carrying capital losses from last year, etc.:

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I would like to receive a copy of my tax return and supporting documents by snail-mail for \$10 extra.  
 (We are now paperless and our secure online portal will allow you 24/7 access to a digital version of your tax return(s).  
 You will be able to pay your invoice, e-sign your e-file authorizations and download your returns at your convenience).

**Please read carefully and sign below:** I am paying for the time and expertise of a professional tax preparer. I understand that I will be charged for the preparation of this return before I am told the amount of my refund or liability to the IRS (Sorry to sound so hardcore! In 2015 we did hours of work for new clients, and if their refund amount matched online software they wouldn't pay, so we had to add this threatening-sounding clause, but you're already a client and you know we're super nice!). I understand that my return will be prepared based on the information I provide and my documents will not be returned to me by mail unless I chose the snail-mail option above. My documents will be available to me in digital form. I am solely responsible for the accuracy of the data that I provide.

**Signature:** \_\_\_\_\_

**Mail or Upload to secure portal (link on website: [AirlineTaxes.com](http://AirlineTaxes.com) or [RoseTaxAndFinancial.com](http://RoseTaxAndFinancial.com)).**

**Rose Tax & Financial, 605 Edwards Avenue, West Dundee, IL 60118 Phone: (847) 715-8930**

[airlinetaxes@gmail.com](mailto:airlinetaxes@gmail.com) Fax: (815)301-2671 (please don't fax unless using efax or it's your only good option) ☺

**Living Abroad Tax Form** Please read carefully and fill out any items that apply to you.

Write in the margins if you have anything else we should know about. ☺ Please include last year's US tax return if you are a new client.



What was your foreign address during the tax year?

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Dates you have lived in the foreign country: From \_\_\_\_\_ To: \_\_\_\_\_;

If you have a spouse is he or she a US citizen? \_\_\_\_\_ If yes, he or she will fill out a separate one of these forms.

Employer's Name : \_\_\_\_\_. Employer's US Address (If no US Address, enter N/A):

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Employer's Foreign Address:

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Employer is a  Foreign Entity;  US Entity;  Foreign Affiliate of a US Entity

Have you previously filed form 2555 (FOREIGN EARNED INCOME EXCLUSION)? \_\_\_\_\_ If so, what year? \_\_\_\_\_

Have you ever revoked an exclusion? \_\_\_\_\_ If so, what year(s)? \_\_\_\_\_

What kind of housing do you live in? :  Purchased House/condo ;  Rented House/apartment;  Rented Room;  
 Housing provided by your employer

Do you have family living with you in the foreign country? \_\_\_\_\_ If yes, who and how long have they been there?

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Did you submit a statement to foreign authorities that you are not a resident? \_\_\_\_\_

Are you required to pay tax to the foreign country? \_\_\_\_\_ Does the country charge taxes to its residents? \_\_\_\_\_

How much did you pay in taxes to the foreign country? \_\_\_\_\_ (Please note if that's USD or foreign currency)

Were you present in the US for any visits during the year? \_\_\_\_\_ If yes, what were the dates?

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On which type of Visa did you enter the foreign country? \_\_\_\_\_ Did the type of Visa limit the length of your stay in that country? \_\_\_\_\_ If so, what is the time limit? \_\_\_\_\_

Did you maintain a home in the US while living abroad? \_\_\_\_\_ If yes, what's the address?

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Was it rented out? \_\_\_\_\_

What is the occupant's name and how are they related to you? \_\_\_\_\_

**What was the amount of your total wages during the year?** \_\_\_\_\_ (Please note if that's USD or foreign currency)

Did you have over \$10,000 in a foreign bank account anytime this year? \_\_\_\_\_

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**Mail, fax, email or upload to secure portal. Rose Tax & Financial, 605 Edwards Avenue, West Dundee, IL 60118**

**AirlineTaxes.com or RoseTaxandFinancial.com Phone: (847)715-8930, Fax: (815)301-2671, jenyarose@gmail.com**

# FLIGHT CREW EXPENSE WORKSHEET

AirlineTaxes.com / Rose Tax & Financial 605 Edwards Avenue West Dundee, IL 60118 (847)715-8930

Fax (815)301-2671/ airlinetaxes@gmail.com

**DO NOT SEND ANY PAPER RECEIPTS! LIST ALL BUSINESS-RELATED ITEMS YOU PURCHASED ON THIS FORM. KEEP RECEIPTS FOR YOUR RECORDS.**

UNIFORM PURCHASES	
Uniform Shirt/Sweater	
Uniform Pants	
Uniform Skirts	
Uniform Dresses	
Uniform Jackets/Coats	
Uniform Accessories	
Uniform Purse/Bags	
<b>Total</b>	
UNIFORM MAINTENANCE	
Alterations & Dry cleaning	
FLIGHT SCHEDULE FOR PER DIEMS	
<b>If you have talked to us about doing a per diem estimate for you disregard this section.</b>	
<b>United:</b> send just the per diem summary page (City Allowances). It has each month down the left side and totals at the bottom. Email us to see a sample.	
<b>AA:</b> Use your HI1 to fill in the Flight Calendar.	
<b>SW:</b> Use your "Payroll Reports" (1 for ea. month) to fill in Flight Calendar. If you don't have the whole year we can estimate from your reimbursement or you can do the "Per Diem Estimate" below.	
<b>Spirit:</b> Include the last pay stub of the tax year.	
<b>Other airline:</b> Use your schedule to fill in the Flight Calendar or do one of the estimates below.	
<b><u>Per Diem Estimate:</u></b>	
<b>Easy way:</b> How many trips did you take this year? 2 day trips: _____, 3 day: _____, 4 day: _____ -----	
<b>More accurate way (takes longer, but gets you more \$):</b> Fill in the Flight Calendar. Dates don't have to be perfect. Ask for or download another copy of the Flight Calendar if you need.	

MISCELLANEOUS FLIGHT EXPENSES	
Union Dues	
Luggage/Bags/Tags/Wheels	
Wings	
SIDA or I.D. Badge	
SUPPLIES	
Cockpit & Jet Bridge Keys	
Logbook/Organizer	
Flashlight/Batteries/Corkscrews	
Travel Security Devices	
Portable Travel Accessories	
International Voltage Converters	
Replacement Manuals	
SUPPLIES TOTAL:	
Total Cell Phone bill for the year	
Percent of cell use that is business related?	%
Total Internet bill for the year	
Percent of internet use that is business related?	%
New Computer	
Percent of computer use that is business related?	%
# of training days: _____, Reimbursement:	
Hotels (NOT at base & not at home)	
Bid Service/Trip Trade/Crew Buddy App	
Language Classes/Tapes	
Driver's Tips	
Passport & Photos	
Per Diem report if you paid for one	
Pilot – FAA Medical Exam	
Pilot – Supplies/Maps/Charts	
Pilot – Sunglasses	
Other:	

\* If you don't see an item here it is probably because it has been disallowed in tax court on multiple occasions. We have researched every flight crew case and have copies of court decisions relating to manicures, shoes, makeup, commuting costs, parking, etc. We want to get you the refund you deserve and keep you off the IRS radar. ☺

AirlineTaxes.com Flight Calendar (847)715-8930. Enter the airport code where you spent each night while on duty.

	Base	Base	Base	Base	Base	Base	Base	Base	Base	Base	Base	Base
	January	February	March	April	May	June	July	August	September	October	November	December
1	1	1	1	1	1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3	3	3	3	3	3
4	4	4	4	4	4	4	4	4	4	4	4	4
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28	28	28	28	28	28	28	28	28	28	28	28	28
29	29	29	29	29	29	29	29	29	29	29	29	29
30			30	30	30	30	30	30	30	30	30	30
31			31		31		31	31		31		31