



## 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.

In case you're wondering, the new tax bill signed into law will not affect anything on your 2017 tax return. Those rules go into effect in 2018 for the return that will be prepared in 2019.

**This year we have sent the same packet out to every client.** Not all of the forms will apply to you.

- Everyone fill out and sign the Recurring Client Form and the Flight Crew Worksheet.
- If you have dependent children fill out one Dependent form for each child.
- If you have a small business or get a 1099-MISC for contract work fill out the Self Employed Worksheet.
- If you are a landlord fill out the Rental Worksheet.

If there are forms that you don't need to fill out please don't send the empty forms – or this letter - back to us.

Either 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). However, keep the reports in your files in case you ever need to prove your layovers.

In 2017 the IRS issued new guidelines for internet security (anti-identity theft protocols) and multiple penalties for not collecting enough information for the child credits/deductions. We usually increase our fee by the standard inflation rate each year (about \$5), but this year we will increase our price by between \$10 and \$25 (depending on the type of return) to cover the extensive training, new security measures and maintenance costs we have incurred.

### **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)). The efficiency of our worksheets keeps our prices low. If you use your own spreadsheet we will need to charge more because it will take longer for the data to be entered.

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 through the portal or by check. 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.



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 printed 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 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.

If I am uploading or emailing documents digitally I am scanning them all together into 1 or 2 PDFs (not a bunch of single documents – because I love my tax preparers and want them to stay sane and ulcer-free!).

**Signature:** \_\_\_\_\_ **(REQUIRED)**

**Upload to secure portal (link on website: [AirlineTaxes.com](http://AirlineTaxes.com) or [RoseTaxAndFinancial.com](http://RoseTaxAndFinancial.com)).**  
**Or send to: Rose Tax & Financial, 605 Edwards Avenue, West Dundee, IL 60118 Phone: (847) 715-8930**  
Flight Crew email: [airlinetaxes@gmail.com](mailto:airlinetaxes@gmail.com) , Email for everyone else: [jenyarose@gmail.com](mailto:jenyarose@gmail.com) Fax: (815)301-2671

**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**

**Dependent Form:** Please fill this out **completely** if you have dependent(s) that are under 24 years old (or are disabled and any age). Fill out 1 sheet per child (photocopy this if you have more than one child to claim).

Your child is considered your dependent if they are younger than 19 by the end of the tax year or, if they are in college, and younger than 24. They must not be claimed by someone else and if they are filing their own return they need to mark on it that they are the “dependent of someone” and not eligible to claim their exemption.

**Dependent #** \_\_\_\_ (It’s easiest to designate the oldest as dependent #1):

Name	Social Security #	Date of Birth	Relationship to you	# of months in your home

YES/NO: I have the right to claim this dependent and I have not released my claim to another person. (If “No” do not continue this form.)

YES/NO: This dependent lived in my home for 183 days or more (if in college he/she spent vacation at home; if there is another parent the dependent spent more time at my home than the other parent’s home)

YES/NO: I was a non-resident alien for part of the year. YES/NO: Part of my salary goes into a dependent care account.

YES/NO: My main home (and that of my spouse if filing together) was in the US for more than half of the year.

YES/NO: I (or my spouse) could be claimed as a child or dependent on someone else’s federal tax return.

YES/NO: The child on this form is married. YES/NO: He/she lived with me in the US for over half the year.

**If I had to I could provide for the IRS:**  social security card,  birth certificate,  a piece of mail the child has received at my address,  school records,  medical records,  a health care provider statement (check all that apply)

YES/NO: Another person could qualify to claim this child.

YES/NO: There is an active Form 8332 Release of Claim to exemption by the custodial parent.

YES/NO: This child is not my son or daughter. If yes, why is the parent not claiming them: \_\_\_\_\_

**This child was under the age of 12** by 12/31 of the tax year and I paid for non-educational care (camp, after-school program, pre-school): Spent \$ \_\_\_\_\_ on childcare for this child while I was working/school full-time:

Provider: \_\_\_\_\_; SSN/EIN: \_\_\_\_\_

Address \_\_\_\_\_

**This child is a student in K-12.** He/she is in grade: \_\_\_\_\_,

the name of the school: \_\_\_\_\_, in this city: \_\_\_\_\_

I am an IL resident that spent money on K-12 education-related items for this child. Spent \$ \_\_\_\_\_ on tuition, registration fees, lab fees, musical instrument rental from the school.

**This child is in college:**  Spent \$ \_\_\_\_\_ this year on higher education. \$ \_\_\_\_\_ for the actual classes (Include the 1098-T from the college with your documents), and \$ \_\_\_\_\_ for supplies including books, software, etc. The education was:  Undergraduate,  Graduate.  I am planning on taking the American Opportunity Credit (the largest undergraduate credit) and realize I can only take it for 4 years. I have already taken the credit for \_\_\_\_\_ years (it’s on or near line 50 and 68 of your previous tax returns). If you took the credit with us disregard this part of the question.

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If you’re filing Head of Household (single person -or lived separate last 6 months of year - with children) please answer:

I am:  not married,  married, but lived apart from my spouse for the last 6 months of the year,

I could provide the IRS with these items if asked:  divorce decree,  separate maintenance or separation agreement,  property tax bill,  lease agreement,  utility bills,  grocery receipts,  other household bills.

YES/NO: I receive non-taxable support:  food stamps,  housing assistance,  childcare assistance

# 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
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