



## AirlineTaxes.com

Rose Tax & Financial  
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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.

**Recurring Client Form** Please read carefully, fill out all fields that apply, and sign the bottom of page 2.

Let us know if you need any help filling this out. Call or email anytime. ☺.

**We need your Driver's License info this year:**

License #: \_\_\_\_\_, State: \_\_\_\_\_, issue date: \_\_\_\_\_, expiration date: \_\_\_\_\_

Spouse License #: \_\_\_\_\_, State: \_\_\_\_\_, issue date: \_\_\_\_\_, expiration date: \_\_\_\_\_

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

Did you get married by 12/31 of the tax year?	
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. Date: \_\_\_\_\_
- Married but filing Separate Give spouse Name/SSN/birthdate above

I have a child that I claim on my return and will fill out **1 Dependent Form** for each child. New this year we have a detailed form for you to get every credit and deduction possible for your dependents and to protect you - and us - from the new penalties. Please fill it out completely for each dependent – thanks! ☺.

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 \$ \_\_\_\_\_ this year on higher education - for  Me,  My Spouse, (If for a dependent include it on the Dependent Form). It was for:  Undergraduate,  Graduate,  I included the 1098-T with my documents (required).

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 a traditional IRA, and/or  Roth – outside of work

Made  Traditional IRA, or  Roth contributions.  For myself \$ \_\_\_\_\_,  Spouse \$ \_\_\_\_\_

I have an HSA,  I have a high deductible health insurance plan

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

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

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 through my job) \$ \_\_\_\_\_.
- 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 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

**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 dependent #1 and haven’t released my claim to anyone. (If “No” don’t continue 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.

YES/NO: The IRS has previously disallowed my child credit or earned income credit. Which year(s)? \_\_\_\_\_

**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
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
5	5	5	5	5	5	5	5	5	5	5	5	5
6	6	6	6	6	6	6	6	6	6	6	6	6
7	7	7	7	7	7	7	7	7	7	7	7	7
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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

**Tax Worksheet for self-employed, independent contractors, sole proprietors, single member LLCs, unreimbursed employee expenses (not flight crew expenses) & people who received a 1099-MISC with box 7 income.**

Try your best to fill this out. If you're not sure where something goes don't worry, every expense on here, except for meals, is deducted at the same rate. If it goes in the wrong category it does not affect the bottom line.

<b>Business Name:</b>	
Type of Business:	
Address:	
Did you begin the business this year? Y / N	
<b>INCOME</b>	
Gross Income	
Returns	
COGS (if you sell product)	
<b>Total Income</b>	
<b>COGS Cost of Goods Sold. (Only use this section if you sell product)</b>	
Opening Inventory (value of inventory on 1/1 - the 1st year it is 0)	
Inventory Purchases	
Materials & Supplies	
Ending Inventory (value of inventory on 12/31)	
<b>BUSINESS AUTO MILEAGE</b>	
<b>Type of Auto:</b>	
<b>Date you began using it for business:</b>	
<b>Business Miles</b> driven this year:	
<b>Personal Miles - required for everyone – please give a mileage amount here:</b>	
You only need to continue with auto section if you spend a lot on maintenance (otherwise the mileage rate above will be a better deduction)	
<b>Gas/oil</b>	
<b>Insurance</b>	
<b>Licenses/Registration</b>	
<b>Repair/Maintenance</b>	
<b>Parking/Tolls</b>	
<b>Other:</b>	

<b>BUSINESS TRAVEL</b>	
Airfare	
Lodging	
Meals while away from home	
Bus, train, taxi, parking, tolls	
<b>BUSINESS EXPENSES</b>	
Advertising (Website, Business cards, Marketing, etc.)	
Commissions & fees you paid	
Contract labor	
Business Insurance	
Health Insurance if not covered by spouse or employer plan	
Mortgage interest (business)	
Interest on business credit cards	
Legal & Professional Services	
Office Expense (ink, paper, etc.)	
Rent of machinery, instruments, storage, studio/office space	
Repairs/Maintenance	
Supplies (supplies unique to your business, i.e. acupuncture needles)	
Taxes & Licenses	
Meals/Entertainment (\$ you spent with the expectation of making money)	
Utilities for a business property (not including home office)	
Wages you paid an employee	
Internet	
Training, Cont. Ed., Conferences	
Cell Phone (business use % only)	
Trade Publications, Subscriptions	

Postage/Shipping	
Memberships, Dues	
Client Gifts	
Promotional Items	
Local Transportation, Parking/Tolls	
Uniform Purchase/Maintenance (i.e. dry cleaning of lab coat, scrubs, etc)	

<b>HOME OFFICE (Only if space is exclusively used for business and it is for your employer's convenience not yours, i.e. they don't offer you a work space)</b>	
Square feet used for business	
Total square footage of home	
Total utilities (electric, gas, garbage)	
Rent (total for the year)	
Renter's Insurance	
\$ spent specifically on the office space	
<b>If you own your home also include:</b>	
Mortgage Interest	
Property Taxes	
Homeowner's Insurance	
<b>Depreciation info below is for New clients only (current clients - we have this info):</b> If you already have a depreciation schedule make sure we have your last year's tax return so we can follow it. Otherwise, answer these:	
Date you purchased the property	
Date you began using the home office	
Purchase price <b>or</b> Fair Market Value on the date it became a home office (whichever is lower)	
Value of the land*	

\*Only the structure is depreciated. You must figure out the land value. You can do this by:

1. Finding it on the appraisal,
2. Getting an appraisal if you haven't,
3. Looking at sales of comparable raw land in your area,
4. Looking on the real estate assessment for the property to figure out what the land portion is on the property tax.

<b>Did you purchase anything over \$500 for the business this year? If so please fill out the following per item:</b>	
Item Name	
Date purchased	
Price	
Percent of business use	%
Item Name	
Date purchased	
Price	
Percent of business use	%

If you have more of these list below.

**Use this space to tell us anything else you think we should know or list any items you're wondering if you can deduct:**

**Rose Tax & Financial 605 Edwards Avenue  
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Fax (815)301-2671/ [jenvarose@gmail.com](mailto:jenvarose@gmail.com)  
mail, email, fax or portal**



# RENTAL INCOME & EXPENSE WORKSHEET for Landlords

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

Fax (815)301-2671/ jenyarose@gmail.com/ mail, email, fax or portal

Address of Rental:	
Dwelling Type:	
Number of days rented during year:	
Number of days you used it personally:	

<b>INCOME</b>	
Rents Received	
Other	
Total Income	\$

<b>EXPENSES</b>	
Advertising	
# of miles travelled	
Airfare Costs	
Cleaning & Maintenance	
Commissions	
Insurance	
Legal & Professional	
Management Fees	
Interest – Mortgage	
Interest - Other	
Repairs	
Supplies	
Taxes	
Utilities	
Association Fees	
Other:	

<b>DEPRECIATION</b>	
<b>This section is for new clients only that are not following a depreciation schedule yet.</b> If you're already on a schedule make sure you send us the last tax return you filed.	
Date you purchased property	
Date it became a rental	
Purchase price <b>or</b> Fair Market Value on the date it became a rental (whichever is lower)	
Value of the land*	

\*Only the structure is depreciated. You must figure out the land value. You can do this by: 1. Finding it on the appraisal, 2. Getting an appraisal if you haven't, 3. Looking at sales of comparable raw land in your area, 4. Looking on the real estate assessment for the property to figure out what the land portion is on the property tax.

**CAPITAL IMPROVEMENTS:** List here (or on back) any improvements you made this year. If it's a repair it goes under expenses (to the left), if it's an improvement (a betterment, adaptation to new use, or restoration) it gets depreciated. This would include any appliances, etc. you purchased. Please list items/projects here with date completed and price. If you're not sure list it and I will move it to repairs if it belongs there.