



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: \_\_\_\_\_

Last year  I received a refund from IRS: approximately \$ \_\_\_\_\_;  I received a refund from state(s): \$ \_\_\_\_\_;

I owed money to the IRS: \$ \_\_\_\_\_.  I'm on an installment plan with the IRS;

Owed money to state: (which state(s) \_\_\_\_\_) amount \$ \_\_\_\_\_.  I'm on a state installment plan.

Deposit my refund (if I receive one) directly into my bank account.

Bank Name \_\_\_\_\_, Routing # (9 digits) \_\_\_\_\_, Account# \_\_\_\_\_.

Driver's License #: \_\_\_\_\_, State: \_\_\_\_\_, issue date: \_\_\_\_\_, expiration date: \_\_\_\_\_

Spouse Driver's License #: \_\_\_\_\_, State: \_\_\_\_\_, issue date: \_\_\_\_\_, expiration date: \_\_\_\_\_

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

- ◆ Last year's Federal & State returns,
- ◆ 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 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. (In 2015 we did hours of work for people, and if their refund amount matched online software they wouldn't pay, so we had to add this threatening-sounding clause. We're really the nicest people to do business with! Just ask around or check Yelp ☺).

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 new 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