



- Spent \$\_\_\_\_\_ to get my tax return prepared last year. (That amount is deductible this year if itemizing).
- 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: \_\_\_\_\_
- 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# \_\_\_\_\_

**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 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 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.

**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) 😊