

- Spent \$_____ out of pocket on medical - Spent \$_____ out of pocket long term care premiums.
- 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# _____.

Please check which items apply to you and to confirm you included them in your documents:

- | | |
|---|---|
| <input type="checkbox"/> Last year's Federal & State returns, | <input type="checkbox"/> 1098-T College or Graduate School Statement, |
| <input type="checkbox"/> W-2(s) from your employer(s), | <input type="checkbox"/> 1099-SSA form for Social Security received, |
| <input type="checkbox"/> 1099-R Distribution from a retirement account, | <input type="checkbox"/> 1099-B forms for brokerage trades: stocks/bonds, |
| <input type="checkbox"/> 1099-MISC forms for self-employment income, | <input type="checkbox"/> K-1 forms from partnership, Corp., or trust, |
| <input type="checkbox"/> 1099-INT (interest) and 1099-DIV (dividends), | <input type="checkbox"/> 1095-A for health insurance bought on exchange, |
| <input type="checkbox"/> 1098 Mortgage Interest Statement, | <input type="checkbox"/> 1099 SSA if you have HSA Health Savings Account, |
| <input type="checkbox"/> Property Tax bill (if not escrowed in mortgage), | <input type="checkbox"/> Bought a new house: Closing Disclosure (3 pages) |
| <input type="checkbox"/> 1098-E Student Loan Interest Statement, | |

Did anything else happen this year that might influence your taxes? (continue on back or separate sheet)
 These might include – received or paid alimony (what date was divorce final?), carrying a capital loss, etc.:

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.

I understand that my return will be prepared based on the information I provide. I am solely responsible for the accuracy of that information and for maintaining the records to support it. My documents will not be returned to me by mail unless I chose the snail-mail option above, but will be available to me to download from the portal.

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)** **Date:** _____

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

Or upload to secure portal. If we haven't set up a portal window for you call us. We'll need your SSN.

(Portal link on website: AirlineTaxes.com or RoseTaxAndFinancial.com).

Flight Crew email: airlinetaxes@gmail.com , Email for everyone else: jenyarose@gmail.com Fax: (815)301-2671

Dependent Form: Fill this out **completely**. One for each dependent. Your child is your dependent if they are younger than 19 by the end of the tax year or, in college and younger than 24 (or are disabled and any age). If your dependent files their own tax return they must mark “someone can claim me as a dependent” on it so your return doesn’t get rejected by the IRS (paper filing and amending will incur extra tax preparation fees).

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 am the custodial parent, 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 vacations at home). If they didn’t live with you for over half the year the Child Tax Credit may not be claimed.

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 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: The child on this form is married. YES/NO: He/she is a citizen, national or resident of the US.

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 are a recurring client of ours disregard this part of the question.

Head of Household: If you’re single or “married living separately from a spouse” for the last 6 months of year 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