Recurring Client Form Please fill out any field that applies to you and sign the bottom of page 2. Let us know if you need any help filling this out. Call or email anytime. ☺.

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

Did you get married?	
Spouse Name	
Social Security #	
Birthdate	
Occupation	
Cell Phone	
Alt. Phone	
Email	

☐ Single;

☐ Married filing Joint

☐ Married but filing Separate Give spouse Name/SSN/birthdate above

☐ Lived separate from spouse for last 6 months of year or more

☐ Divorced during the tax year

☐ Head of Household (unmarried with dependent(s) in the house)

☐ Widowed during the tax year. Date: ___________

New Dependent? Name	Social Security #	Date of Birth	Relationship	Lived with you all year?

☐ 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 $_______ on childcare while working/school full-time: Provider:____; SSN/EIN:__________________ Address____

☐ Spent $ _______this year on higher education (Include 1098-T from the college with your documents). It was for ☐ Undergraduate, ☐ Graduate - for ☐ Me, ☐ My Spouse, ☐ My Dependent (s); which dependent(s)?____.

☐ I am an IL resident that spent money on K-12 education-related items. Please note which child, name of school, grade, and how much you spent (tuition, registration fees, lab fees, musical instrument rental from the school).

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

Made ☐ Traditional IRA, or ☐ Roth contributions, not through my job. ☐ For myself $________, ☐ Spouse $________

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

☐ 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 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: ____

☐ 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 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 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.

Signature: ____________________________________

Mail or Upload to secure portal (link on website: AirlineTaxes.com or RoseTaxAndFinancial.com).

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

airlinetaxes@gmail.com Fax: (815)301-2671 (please don't fax unless using efax or it's your only good option) ☺