

- I am not a full-time employee of a company and I pay for my own health insurance premiums: \$ _____ for the year.
- Drove _____ miles doing volunteer work for a 501c3 charity. Drove _____ miles for doctor visits.
- I have over \$10,000 in a foreign bank account. If so, ask us for the FBAR worksheet (or download it from our website).
- Sent in quarterly Estimated Taxes: Dates & amounts: _____
- I got an IP Protection PIN from the IRS this year for extra security. It is: _____
- Last year I received a refund from IRS: approximately \$ _____; I received a refund from state(s): \$ _____;
- I owed money to the IRS: \$ _____. Owed money to these state(s): _____ amount \$ _____.
- 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"/> W2G for Gambling winnings |
| <input type="checkbox"/> 1098-E Student Loan Interest Statement, | <input type="checkbox"/> Bought new house or Refi: Closing Disclosure (3 pgs) |

Did anything else happen this year that might influence your taxes? (continue on 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. (Our secure online portal will allow you access to your tax return(s) and the documents you sent us.)

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, 8 Piñon Avenue Cedar Crest, NM 87008 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). **We love faxes!**

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