Recurring Client Form Please read carefully, fill out all fields that apply, and sign the bottom of page 2.

We need your Driver's License info if it expired since you gave it to us last year:

License #: ____________________________, State: ____, issue date: ____________, expiration date: ______________

Spouse License #: _________________________, State: ____, issue date: ___________, expiration date: ____________

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

Only fill out if you have a new spouse as of 12/31:	
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: ___________

☐ I have a child that I claim on my return and will fill out **1 Dependent Form** for each child. I am also verifying that I have asked that child not to file their own tax return until the IRS has accepted my filing (if we need to paper file and amend to correct that mistake there will be an extra fee). Please fill out 1 completely for each dependent – thanks! ☺.

☐ Had health insurance the whole year. ☐ Bought it on the ACA marketplace/exchange and will include form 1095-A

☐ Did not have health insurance for these months: ____

☐ Spent $ _________this year on higher education - for ☐ Me, ☐ My Spouse , (If for a dependent include it on the Dependent Form). It was for: ☐ Undergraduate, ☐ Graduate, ☐ I included the 1098-T with my documents (required).

☐ I was a resident of this state for the whole year: ______ ☐ I was a part-year resident of these states: _____ & _____

☐ I moved on (Date): ___/___/___ from (city, State):_________________ to (city, ST): ___________________.

(☐ I am military and spent $______ on moving/storage, & $_____ on travel/lodging.) Non-military – no deduction.

☐ Made: ☐ Traditional IRA, or ☐ Roth contributions (outside of work). ☐ 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.

☐ I received, sold, sent, exchanged, or acquired interest in virtual currency this year. (Include docs if this applies to you).

☐ Bought a car/boat, RV, large purchase (not a house). 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)

☐ I own my home; ☐ The value of my mortgage is less than $750,000 (if over $750k, what is the value? $________)

☐ I pay interest on a home equity loan; I spent the loan $ ☐ on the home, ☐ on other items (paid credit cards, car, etc.)

☐ Donated **money** to charity: total amount: $__________, ☐ I own a 2nd home that is not a rental

☐ 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 ☐ Spent $__________ out of pocket long term care premiums.

☐ 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: _______________________

☐ Deposit my refund directly into this account:

Bank Name _____________________, Routing # (9 digits) ___________________, Account# __________________.

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

☐ W-2(s) from your employer(s),
☐ 1099-R Distribution from a retirement account,
☐ 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 for 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 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.:

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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.
(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 tax preparers and want them to stay sane and ulcer-free!).

Signature: ____________________________________ **(REQUIRED)** **Date:** _______________

Mail to: Rose Tax & Financial, 8 Piñon Avenue Cedar Crest, NM 87008 (If you received a packet and the envelope is addressed to our office manager in Elgin, IL then send everything there. Either way it will get to us.) ☺ **We love when you Fax your documents!** Fax #: (815)301-2671

Or upload to secure portal (link on website: AirlineTaxes.com or RoseTaxAndFinancial.com) Flight Crew email: airlinetaxes@gmail.com **,** Email for everyone else: jenya@rosetaxandfinancial.com **Phone: (847) 715-8930**