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	

Did you get married by 12/31 of the tax year?	
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).

☐ Moved: Date: ___/___/___ from (city, State):_________ to (city, ST): __________.

(For military only – spent $______ on moving/storage, & $_____ on travel/lodging.)

☐ I have a traditional IRA , and/or ☐ Roth – outside of work

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

☐ 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)

☐ 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.

☐ Health insurance premiums I paid out of pocket (not through my job) $ _________.

☐ 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# ________________

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 a new house: Closing Disclosure (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 (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.
(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 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:** _______________

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

Or upload to secure 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