



# DID YOU OR YOUR SPOUSE LAST YEAR... (check all that apply)

- Do you currently have health insurance coverage?
- Are you receiving health insurance coverage through an ACA Marketplace

- Purchase a home last year?
- Have you ever claimed the First Time Home Buyer's Credit?
- Purchase qualified residential energy products for your home?

- Receive wages, salaries, or any other employer compensation?
- Receive W-2 forms from ALL employers you worked for last year?
- Receive unemployment compensation?
- Receive alimony?
- Receive Social Security Income?
- Pay alimony?

If Yes, Name of Recipient  SSN of Recipient

List all W-2 Wages from Box 1 Below:

Employer Name	Wages
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>

- Pay daycare expenses? (Name, address and SSN (or EIN) of provider is required)
- Receive winnings from gambling? (lottery, race track, casinos, raffles, etc.)
- Receive any miscellaneous income? (prizes, awards, jury duty, etc.)  
Amount and description are required
- Pay interest on student loans?
- Receive a state tax refund?
- Pay real estate taxes?
- Have a Home Mortgage?
- Have medical expenses or pay for health insurance?
- Contribute to charity, church, etc?
- Receive pension, annuity, ROTH, IRA or retirement income?
- Receive interest on savings, cash, US bonds, stock dividends?
- Have a Health Savings Account (HSA)?
- Have out-of-pocket expenses, use personal vehicle on the job, etc?
- Have a loss from casualty? (fire, theft, natural disaster, etc.)

- Have a job-related move?
- Contribute to a:
  - ROTH IRA \$
  - SEP \$
  - Traditional IRA \$
  - Keogh \$
  - Simple Retirement Plan \$
- Take a distribution from any retirement account?
- Pay college tuition expenses?
- Are you enrolled as a:
  - FT Student
  - PT Student
- Was the Earned Income Credit ever disallowed for you?

- Sell stock, mutual fund, or other securities?
- Receive any 1099's (e.g. 1099-A, 1099-C, 1099-Misc)?
- Own your own business or work as self-employed?

- Use a portion of your home exclusively for business?
- Sell your home?  Sell any other property? (equipment, land, etc.)
- Make estimated tax payments?

Business Name  Proprietor Name  Date of Business Start

- Own rental property or convert rental property to personal use?
- Receive royalties?
- Operate a farm?
- Receive installment payments on property sold?
- Have an interest in a partnership, S-corporation, estate or trust?
- Have income as a minister?  Receive housing allowance?

If I'm due a refund, I would like the convenience of having fees taken out of my refund instead of paying Professional Tax Services out of my pocket.

All information I have given is true and correct to the best of my knowledge.

Client's Signature  Spouse's Signature  Date  Prep-ID (Professional Tax Services Employee)