

PERSONAL INFORMATION

DATE _____ TAX YEAR _____
 TAXPAYER'S NAME _____ SOC/SEC # _____ | _____ | _____ DOB _____
 SPOUSE'S NAME _____ SOC/SEC # _____ | _____ | _____ DOB _____
 STREET ADDRESS _____ EMAIL _____
 CITY _____ STATE _____ ZIP _____ COUNTY _____
 SCHOOL DISTRICT _____ HOME # _____
 CELL # (T) _____ CELL # (S) _____
 WORK # (T) _____ WORK # (S) _____

DEPENDENTS: NAME & INITIAL LAST NAME (IF DIFFERENT) BIRTH DATE SOCIAL SECURITY NUMBER RELATIONSHIP

DEPENDENTS: NAME & INITIAL	LAST NAME (IF DIFFERENT)	BIRTH DATE	SOCIAL SECURITY NUMBER	RELATIONSHIP

1. Did you pay more than half the cost of maintaining your home? Y or N
2. Are there children in the household that someone else claims or can claim? Y or N
3. Did your children live with you more than half the year? Y or N
4. Did you provide more than half the support for your dependent? Y or N
5. Are any of your children permanently and totally disabled? Y or N
6. Was the dependent under age 24 and a full-time student for 1/2 the year? Y or N
7. If the dependent is older than 19 and not a full time student, is the dependent's income less than \$4050 in 2016? Y or N
8. Are you related to the child you are claiming? Y or N
 If not the blood parent, how are you related? _____

***INCOME:** You must attach all W-2s, 1099s (1099-INT, 1099-DIV) that you receive to match IRS records.

INTEREST INCOME: List below any interest amounts not shown on a Form 1099-INT

DIVIDEND INCOME: List below any dividend amounts not shown on a Form 1099-DIV

Name of Payer	Amount	Name of Payer	Dividends	Qualified
_____	\$ _____	_____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	\$ _____
_____	\$ _____	_____	\$ _____	\$ _____

Do you have Tax Exempt Interest? Y or N (attach form)
 Did you sell securities (stocks, mutual funds)? Y or N (attach 1099B) Other: _____
 Foreign Assets: Do you have foreign assets valued more than \$50,000? Y or N
 Do you have any foreign bank/investment accounts? Y or N

*****Investment expenses are deductible in some situations. See the itemized deduction worksheet, or attach a list of expenses directly related to your investment income.*****

RETIREMENT DISTRIBUTIONS: You must attach all 1099 R's (IRA, 401K, 403b, pension & annuity statements)

SOCIAL SECURITY BENEFITS: (attach forms 1099 SSA) TAXPAYER: Y or N SPOUSE: Y or N
 Taxpayer \$ _____ Spouse \$ _____

RAILROAD RETIREMENT BENEFITS: (attach all 1099-R's) TAXPAYER: Y or N SPOUSE: Y or N
 Taxpayer \$ _____ Spouse \$ _____

Did you receive any alimony? Amount \$ _____ Unemployment? Y or N (attach form)

DID YOU MAKE ESTIMATED TAX PAYMENTS? Y OR N

FEDERAL ESTIMATED TAXES PAID

DATE		AMOUNT
APRIL	2016	\$ _____
JUNE	2016	\$ _____
SEPTEMBER	2016	\$ _____
*JANUARY	2017	\$ _____

STATE ESTIMATED TAXES PAID:

DATE		AMOUNT
APRIL	2016	\$ _____
JUNE	2016	\$ _____
SEPTEMBER	2016	\$ _____
*JANUARY	2017	\$ _____

*If the 4th quarter payment was made in December instead of January, please note.

DEDUCTIONS:

RETIREMENT CONTRIBUTIONS:

IRA/SEP/SIMPLE (SELF)	\$ _____	ROTH (SELF)	\$ _____
IRA/SEP/SIMPLE (SPOUSE)	\$ _____	ROTH (SPOUSE)	\$ _____

H.S.A. CONTRIBUTIONS: \$ _____

(Not on W-2)

H.S.A. SPENT ON MEDICAL \$ _____

(Attach Form 1099SA and 5498SA)

ALIMONY PAID: \$ _____ Name of ExSpouse _____ SSN _____

(You must attach a copy of your divorce decree)

STUDENT LOAN INTEREST PAID: Taxpayer \$ _____ Spouse \$ _____ (Attach Forms)

CREDITS:

COLLEGE CREDITS / DEDUCTIONS:

STUDENT NAME _____	YEAR IN COLLEGE _____
TUITION PAID (ATTACH 1098-T) \$ _____	COLLEGE BOOKS, EQUIP, FEES \$ _____

Was student more than a half-time student for 5 months? Y or N

Has the American Opportunities Credit or Hope Credit been taken for this student a total of 4 or more times? Y N

CHILD CARE:

COST: \$ _____	CHILD'S NAME _____
Provider's Name _____	Provider's SSN/EIN _____
Provider's Address _____	Provider's City, State, Zip _____

RESIDENTIAL ENERGY CREDITS:

Did you do any energy efficient improvements to your home? If so, we will need the dollar amounts of each item.

Windows – Cost \$ _____	Doors – Cost \$ _____	Insulation – Cost \$ _____
Furnace – Cost \$ _____	Solar – Cost \$ _____	Geothermal – Cost \$ _____
Other – Describe _____	Cost \$ _____	

Have you claimed this credit in past years? **Y or N**