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2017 TAX YEAR ADDITIONAL INFORMATION & QUESTIONS.
This form needs to be completed and returned with your Organizer/Checklist Forms

Taxpayer(s) Name: _____

- ___ **Real estate tax PIN (property identification number) and county of residence** (if new client or new home).
- ___ Claiming **auto mileage** as a deduction for medical expenses, business, rental properties or unreimbursed employee expenses?
If so, please provide: total miles driven for the year, as well as total business and/or medical miles driven for the year
- ___ Provide copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received
- ___ Provide copies of *last* paystubs of 2017 for *each* job
- ___ **Need proof of health insurance for everyone living in your household and/or you are claiming as a dependent in 2017.**
Supply all Forms 1095-A, B and/or C. If exempt, proof is required. **(PLEASE do not let your dependents file their own taxes.)**
- ___ **Illinois grade school/high school students** → To qualify for the state credit, provide: student name/grade level; name/location of school; amounts paid for tuition, registration fees and book fees *only* (no sports or extra-curricular activities)
- ___ All legal documents for divorce decrees (new clients or recently divorced)

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- ___ Do you want to allow your tax preparer to discuss this year's tax return with the IRS? **YES NO**
 - ___ Did you receive payments in/from Bitcoin/PayPal/GoFundMe/FantasySports/EBay or other third party sources? **YES NO**
 - ___ At any time during the tax year did you have an interest in, a signature or other authority over a bank account or other financial account in a foreign country? **YES NO**
 - ___ Did you pay interest on a student loan for yourself, spouse or dependent? **YES NO**
 - ___ Did you, your spouse, or dependent attend a post-secondary school in 2017? **YES NO**
(If **YES**, from **each** school you will need to provide **ALL Forms 1098-T, Student's Statements of Account** and *all Grant/Scholarship Agreements*. **NEW:** Per IRS, **NO** tax credit/deduction will be allowed without these documents!)

NOTE: For Child Tax Credit (CTC), Earned Income Credit (EIC) and/or American Opportunities Tax Credit (AOTC) for college, **you will be asked to supply additional information as needed.**

- ___ Did any member of your household purchase items in 2017 without paying sales tax? **YES NO**
If YES, please include the total amount of these purchases _____

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- ___ **Updated e-mail address** for expeditious communications. _____
 - ___ Voided check for account where refunds should be direct deposited (optional)
 - ___ **Signed Engagement Letter** (See attached)
 - ___ **To efile:** Provide **Driver's License (DL) info (for you and your spouse): DL # or state ID #; Issue dates; Expiration dates**
 - ___ If applicable: Provide copy of IRS letter/letters with the efile ID PIN for you and/or your spouse.
 - ___ **New clients:** copies of prior federal, state and local tax returns (preferably three years) and depreciation schedules, if applicable.