
Part III. Income – In 2016, did you or your spouse receive:

Yes No Unsure

- 1. Wages or salary? (Form W-2) If yes, how many jobs did you have in 2016? _____
- 2. Tip income?
- 3. Scholarships? (Forms W-2, 1098-T)
- 4. Interest/dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
- 5. Refund of state/local income taxes? (Form 1099-G)
- 6. Alimony income?
- 7. Self-employment income? (Form 1099-MISC)
- 8. Cash/check payments for any work performed not reported on Forms W-2 or 1099?
- 9. Income (or loss) from the sale of stocks, bonds, or real estate (including your home)? (Forms 1099-S, 1099-B)
- 10. Disability income (such as payments from insurance, or workers' compensation)? (Forms 1099-R, W-2)
- 11. Distributions from pensions, annuities and/or IRAs? (Form 1099-R)
- 12. Unemployment compensation? (Form 1099-G)
- 13. Social Security or Railroad Retirement benefits? (Forms SSA-1099, RRB-1099)
- 14. Income (or loss) from rental property? (Record of income)
- 15. Other income: (gambling, lottery, prizes, awards, raffles, jury duty, etc)? (Forms W-2G, 1099-MISC)
Specify :

Part IV. Expenses – In 2016, did you or your spouse pay:

Yes No Unsure

- 1. Alimony? If yes, do you have the recipient's SSN?
- 2. Contributions to a retirement account?
- 3. Educational expenses for yourself, spouse or dependents, such as tuition, fees, books, etc.? (Form 1098-T)
- 4. Unreimbursed employee business expenses (such as uniforms or mileage)?
- 5. Medical expenses (including health insurance premiums)?
- 6. Home mortgage interest? (Form 1098)
- 7. Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)
- 8. Charitable contributions? (Record of contributions or receipts)
- 9. Child or dependent care expenses such as day care? (Record of payments or receipts)
- 10. For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc?

Part V. Life Events – In 2016, did you or your spouse:

Yes No Unsure

- 1. Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in Box 12)
- 2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Forms 1099-C, 1099A)
- 3. Buy, sell or have a foreclosure on your home? (Form 1099-A)
- 4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? _____
- 5. Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc)
- 6 Live in an area that was affected by a natural disaster? If yes, where? _____
- 7 Receive the First Time Homebuyer's Credit in 2008?
- 8 Pay any student loan interest? (Form 1098-E)
- 9. Make estimated tax payments or apply last year's refund to your 2016 tax? If so, how much? _____
- 10. Attend school? (Form 1098-T)
- 11. Adopt a child?
- 12. File a 2015 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D?
- 13. Become a victim of identity theft?

Presidential Election Campaign Fund: (If you check this box, your tax or refund will not change.)Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. You Your spouse

Part VI. Health Care Information – In 2016, did you, your spouse, or dependent(s)

Yes No Unsure

- 1. Have health care coverage?
- 2. Receive one or more of these forms? (Check the box) Form 1095-B Form 1095-C
- 3. Have coverage through the Marketplace (Exchange)? [Provide Form 1095-A]
- 3A. If yes, were advance credit payments made to help you pay your health care premiums?
- 3B. If yes, is everyone listed on your Form 1095-A being claimed on this tax return?
- 4. Have an exemption granted by the Marketplace?

Part VII. Your Refund or Balance Due

- If you are due a refund, would you like a direct deposit? Yes No
- If you are due a refund, would you like to purchase U.S. Savings Bonds? Yes No
- If you are due a refund, would you like to split your refund between multiple accounts? Yes No
- If you have a balance due, would you like to make a payment directly from your bank account? Yes No

Part VIII. Additional Information

Please describe any other circumstances which may affect your tax return:

Signature _____

Date _____