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2016 TAX YEAR ADDITIONAL INFORMATION & QUESTIONS.
This form needs to be completed and returned with your Organizer Forms

Taxpayer(s) Name: _____

- Your **real estate tax pin number** and **county of residence** (if new client or new home).
- If you are claiming **auto mileage** as a deduction for medical expenses, business, rental properties or unreimbursed employee expenses **provide**: total miles, commuting miles and business/medical miles driven for year
- Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received
- Copy of last paystub of 2016 for each job
- Proof of health insurance for everyone living in your household and/or you are claiming as a dependent in 2016. Forms 1095-A, B or C (PLEASE do not let your dependents file their own tax returns.)**
- Exemption Certificate Number (if you received an exemption from needing health insurance from the Marketplace (Exchange))
- Illinois grade school/high school students** → amounts paid for tuition, registration and book fees; name/location of school; student name and grade level.
- All legal documents for formation, sale or purchase of a business during the year
- All legal documents for divorce decrees (new clients or recently divorced)
- Do you want to allow your tax preparer to discuss this year's tax return with the IRS? **YES** **NO**
- Did you have any foreign income or pay any foreign taxes in 2016? **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 2016? **YES** **NO**
(If **YES**, you will need to provide **BOTH** *Form 1098-T* and a *Statement of Account* from the school.
NEW: Per IRS, **NO** tax credit/deduction will be allowed without these documents!)
- Did any member of your household purchase items in 2016 without paying sales tax? **YES** **NO**
If YES, please include the total amount of these purchases _____
- Do you prefer a paper copy of your return or an electronic (PDF) copy? **Paper** _____ **PDF** _____
- Updated e-mail address** for expeditious communications. _____
- Voided check for account where refunds should be direct deposited (optional)
- Signed Engagement Letter** (See attached)
- New clients:** copies of prior federal, state and local returns and depreciation schedules if applicable, (at least one year – preferably three)