



TAXPAYER NAME _____

SPOUSE NAME _____

ADDRESS _____ CITY _____ ZIP _____

CONTACT INFO: Home Phone _____ Email: _____

Taxpayer Cell Phone: _____ Spouse Cell Phone: _____

Preferred method of contact: Phone E-mail Text Best time to contact you: _____

FILING STATUS: (Circle) Single Married Filing Joint Married Filing Separate Head of Household

Qualifying Widow(er)

of Dependents and Ages: _____

If Dependent is over 18 and under 24, were they a full-time student at least 5 months of the year? _____

If yes, **Form 1098T** and tuition billing statement are needed to claim learning credits. Also include cost of books and required supplies. Did they receive scholarships or grants? _____ Amount? _____

How many years have they attended college? _____

If over 18 and not a student, how much money did they make? _____

If divorced or separated, enter the number of months the child lived with you _____ Can you claim the child(ren) this year? _____ If so, list name(s) _____

DID ALL MEMBERS OF THE HOUSEHOLD HAVE MEDICAL INSURANCE FOR THE ENTIRE YEAR? _____

DOCUMENTS REQUIRED: 1095-A if ObamaCare, 1095-B, or 1095-C for insurance through employer.

Do you have a Health Saving Account? _____ Did you make any contributions other than what was deducted from your paycheck? _____ Amount? _____ Family or Individual Plan? _____

Did you take any distributions from your HSA? If so, amount? _____ Amount of distribution used to pay medical bills? _____

Educator expense - Amount claimed? _____ Student Loan Interest paid? _____

Alimony paid: _____ Ex-spouse's name and Social Security # _____



IRA CONTRIBUTIONS: (not associated with employment)

Traditional IRA: Taxpayer _____ Spouse _____

ROTH IRA: Taxpayer _____ Spouse _____

IRA DISTRIBUTIONS: If Traditional IRA, include 1099-R form.

If ROTH IRA, will need to determine if amount withdrawn is contributions or earnings unless you are over 59 ½.

INCOME: (ENTER THE # OF FORMS and include documentation)

W-2s (wages) _____ 1099-Rs (Retirement Income) _____ Interest Received (1099-INT) _____

Dividends (1099-DIV) _____ Unemployment (1099-G) _____ Social Security Statements _____

Gambling Winnings (W2G) _____ K-1s (1065, 1120-S, 1041) _____

ENTER THE AMOUNT RECEIVED OF:

State Refund (if you itemized last year) _____ Alimony Received _____ Jury Duty _____

Other Type of Taxable Income: (List type and amount) _____

OTHER TYPES OF DOCUMENTS NEEDED:

Brokerage Statements, Tax Bills, Rental Income and Expenses, Self-Employment Income and Expenses

DEPENDENT CARE EXPENSES:

List dependent(s) _____

Need name, address, and social security or EIN # of Child Care Provider

Include billing statement if possible

PRIVATE SCHOOL TUITION:

Name of Student _____ Grade _____ Tuition paid _____

School Name _____ EIN# _____

Include billing statement if possible.



EDVEST / TOMORROW'S SCHOLAR / 529 PLANS:

CONTRIBUTIONS: (deductible on WI only)

Beneficiary (Student) _____

Amount of Contribution _____

DISTRIBUTIONS: (1099-Q)

Earnings may be taxable. Information needed to compute taxable portion (if any):

Tuition, Scholarships/Grants (on 1098-T), housing expense, books, and supplies. Beneficiary must be student!

RESIDENTIAL ENERGY CREDIT

Must be on main home. What was installed? _____ Total cost? _____

Have you taken the energy credit in the past? _____

ESTIMATED TAX PAYMENTS MADE:

1st payment amount? IRS _____ WI _____ Date the payment was made? _____

2nd payment amount? IRS _____ WI _____ Date the payment was made? _____

3rd payment amount? IRS _____ WI _____ Date the payment was made? _____

4th payment amount? IRS _____ WI _____ Date the payment was made? _____

WISCONSIN INFORMATION NEEDED: Rent paid _____ Rent included heat? _____

Taxes paid on home? _____ Medical insurance premiums paid out of pocket? _____

Long term health care premiums? Taxpayer _____ Spouse _____

OTHER INFORMATION NEEDED:

Medical, Dental, Eye Care, Prescriptions, Hearing Aids, Other medical devices, Mileage to & from appointments.

Taxes – prior year balance due to state, taxes PAID on other real estate.

Mortgage Interest, PMI, Home Equity Interest (must be used for home additions – deck, garage, etc)

Charitable Contributions – cash/check, property donated (goodwill), stocks, volunteer mileage, gambling losses

ALSO INCLUDE ANY 1099-MISC, INCOME AND EXPENSES OF RENTAL PROPERTIES OR BUSINESSES YOU OWN.