

continued on other side

Did you pay college tuition/expenses for yourself or dependents in 2016? Yes/No
If additional supplies/equipment were required by the college, please enclose a detailed list.
Provide proof of tuition/books paid, **Form 1098-T**, and details of any scholarships awarded to student.

Did you withdraw money from an educational IRA or 529 plan? Include Form 1098-Q. Yes/No

Did you pay interest on college loans? Include Form 1098-E. Yes/No

Do you have any 2nd mortgages or home equity loans? Include Form 1098 for each loan. Yes/No

Did you refinance any mortgages/equity loans? Include settlement statement. Yes/No

Did you make any substantial retail purchases? (ie: car, boat, camper, home improvement supplies) Provide receipts. Yes/No

Do you use your own automobile for business/work purposes and are not reimbursed by your employer?
(Not commuting miles) See website for rules/recordkeeping/worksheet. Yes/No

Do you use a home office to perform the duties of your business or job?
See website for rules/recordkeeping/worksheet. Yes/No

Did you buy or sell a personal residence? Include settlement statement(s). Yes/No

Did you claim the First Time Homebuyer Credit on your 2008 tax return? (for payback) Yes/No

Did you purchase energy efficient property? (ie: insulation, doors, furnace, etc) Yes/No
Include receipt(s) and manufacturers certification(s). See MFG's website.

Did you pay for any Child Care expenses while you worked? Statement from provider(s) or Yes/No
Name of provider: _____ SS# or FEIN _____
Address: _____ Amount paid \$ _____
of children in daycare _____
Employer dependent care benefits (flex) on W2? Yes/No

Did you pay registration fees/tuition for you dependents, grades K-12, in excess of \$250.00? Yes/No
Name of student(s) _____ Grade(s) _____
Name of school(s) _____ Amount paid for tuition/books \$ _____

Did you contribute to or withdraw money from an HSA account? Provide forms 5498-SA and/or 1099-SA Yes/No

Have you read and signed the enclosed ACA (healthcare) worksheet? Yes/No
Provide documentation listed on worksheet as applicable to your situation.

If any answers to the above are yes, we need the documentation or requested to support the income/deduction.

Direct Deposit information: check if same as 2015
Bank Name: _____ Account number: _____
Routing Number: _____ Checking ___ Savings ___

This information is true and correct to the best of my/our knowledge. All items of income have been reported and all items of expense are supported by receipt, canceled check, or other evidence.

SIGNATURES: _____
PRIMARY TAXPAYER **SPOUSE (JOINT RETURN)** **DATE**
Preparer