



Personal Information					
Check Box if Personal Info Is Same As Prior Year <input type="checkbox"/>					
Name (First, Initial, Last)		Soc. Sec. No. (Required)	Date of Birth	Occupation	Work Phone
Taxpayer Name					
Spouse Name					
Street Address		City	State	Zip	Home Phone
Taxpayer Email			Cell Phone		
Spouse Email			Cell Phone		



Dependents							
Check Box if Dependent Info Same as Prior Year <input type="checkbox"/>							
Check Box if Not Applicable <input type="checkbox"/>							
Name (First, Initial, Last)	Relationship	Date of Birth	Soc. Sec. No. (Required)	Months Lived with You	√ If Disabled	√ If Full Time Student	Gross Income

Answer the following:

If no dependents, skip to #5 (GI \$4050)

- | | Yes | No | | Yes | No |
|--|--------------------------|--------------------------|---|--------------------------|--------------------------|
| 1. Any births or adoptions? Bring in Paper work and Social Security Cards. | <input type="checkbox"/> | <input type="checkbox"/> | 12. Does your family have any delinquent child support, government loans, debts, etc.? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do any of your dependents have wages? | <input type="checkbox"/> | <input type="checkbox"/> | 13. In the last year, have you filed for bankruptcy, cancellation of debt, short sale, abandonment or foreclosure? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do any of your dependents have investment income such as dividends, interest income, sale of stocks, or other income? (Kiddie Tax \$2100) | <input type="checkbox"/> | <input type="checkbox"/> | 14. List how many people live in your household, their relationship to you, if they are temporarily gone due to college, & etc. Include any individuals you care for and could possibly be claimed as a dependent of yours. | | |
| 4. Do you need Form 8332? Noncustodial Parent claiming dependent needs form attached. | <input type="checkbox"/> | <input type="checkbox"/> | _____ | | |
| 5. Any marriage or remarriage? Provide us with marital agreements. | <input type="checkbox"/> | <input type="checkbox"/> | _____ | | |
| 6. Any divorce or separation? Explain and review if all final tax returns have been filed. Provide copy of divorce decree. | <input type="checkbox"/> | <input type="checkbox"/> | _____ | | |
| 7. Any family deaths that would need a final tax return filed? | <input type="checkbox"/> | <input type="checkbox"/> | _____ | | |
| 8. Is anyone in your family not a U.S. Citizen? | <input type="checkbox"/> | <input type="checkbox"/> | 15. If you have a refund, would you like it directly deposited into a checking/savings account? If yes, provide us with the account information (Routing #, Acct #, Name of Bank & Type of Account). | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Are you aware of the WI marital law and how to properly title your assets? | <input type="checkbox"/> | <input type="checkbox"/> | | | |
| 10. Did anyone in your family make gifts in excess of \$14,000 to any one individual? | <input type="checkbox"/> | <input type="checkbox"/> | | | |
| 11. Did your family inherit any items during the tax year? | <input type="checkbox"/> | <input type="checkbox"/> | | | |

Employment and Other Income

- Alimony Received
- Barter Income
- Business Income & Expenses
- Cancellation/Abandonment (Form 1099C/1099A)
- Disability Income
- Farm Income — Schedule F
- Gambling/Lottery Winnings
- Gifts >\$14000 (Money/Property-FMV)
- Jury Duty Pay/Repay
- K-1's-Partnership, Trust, S-Corp Income
- Miscellaneous Income (Form 1099-Misc)
- Annuities/1035 Exchanges
- Prizes or Awards
- Railroad Income
- Retirement Plan Distributions (Form 1099-R)
- Scholarships and Fellowships
- Social Security Income (\$15720)
- State and Local Income Tax Refunds
- Tip Income
- Unemployment Compensation (Form 1099-G)
- W-2 Forms

Investment Income

- Capital Gains/Brokerage Transactions (Form 1099-B)
Basis Information Needed
- Dividend or Interest Income (Form 1099-Div/1099-Int)
- OID (Form 1099-OID)
- Rental Income & Expenses
- Vacation Home (Sch E)
- Sale of Property
- Purchase of Property

Homeowners and Renters

- Mortgage Interest (Form 1098)
- Mortgage Insurance Premiums
- Real Estate Taxes Paid
 - 2015 Pd-
 - 2016 Pd-
- Sale of Home or Other Real Estate (Form 1099-S)
- Rent Paid (w/o Heat or w/Heat)
- Moving Expenses
- Purchase of New Home
 - _____2007 (**Repay Loan 15 years**)

Expenses/Credits/Deductions/Adjustments

- Adoption Credit (Fed \$13460/WI \$5000)
- Alimony Paid
- Armed Forces-Active During The Year
- Casualty/Theft Expenses
- Cash Charitable Donations
- Non Cash Donations
- Childcare Expenses (**Fed/WI**)

Expenses/Credits/Deductions/Adjustments

- EIC/CTC/AOTC.....MUST Attach Form 8867**
(detailed Due Diligence)
- Energy Residential Credit (Lifetime \$500)
- Educator Expenses (\$250)
- Education Expenses (WI max \$6943)
 - ___529/Edvest/Coverdell Contributions
 - ___529/Edvest/Coverdell Withdraws
 - ___Distribut w/in 365 days of Contrib (Include in Income)
 - ___Reimbursements
 - ___Scholarship/Grants Received
 - ___Redeem Qual US Savings Bonds
 - ___Private School/WI Only (K-8 \$4000/9-12 \$10000)
- Health Savings Account (\$3350/\$6750/\$1000)
- Insurance Premiums
 - ___LTC Premiums
 - ___S/Employed Premiums
 - ___Paid for After Tax
 - ___Medicare B/D
 - ___Pretax

Affordable Care Act

- ___1095-A
- ___1095-B
- ___1095-C
- ___No Health Insurance
- ___Qualifies for Exemption
- ___PTC (Household Income is Modified AGI of you, spouse & dependents you claim on return)
- Investment Expenses
- IRA Contributions for Calendar Year (\$5500/\$1000)
 - ___Traditional
 - ___Roth
- Job Hunting Expenses (Present Occupation)
- Medical/Dental, Eyeglasses, Prescriptions...
- Student Loan Interest (Max \$2500)
- Out of State/Internet/Catalog Purchases-No Sales Taxes Paid? Use Tax Owed?**
- SEP/Simple/Solo 401K Contribution
- Tax Return Preparation Fees
- Unreimbursed Job Expenses (Travel, Uniforms, Union Dues, Safety Equip, Protective Clothing, Subscriptions, etc.)
- Education Expenses (Maintains Job Skills Req'd by Employer)
- Other (Safe Dep, Invest, Gambling, Legal, Financial Planning)

Additional Information

- Estimated Tax Payments Made For Calendar Year
- IRS or State Correspondence & Assessment Notices
- Any Significate Changes for Next Year
- WDR Unclaimed Property**
- Open WDR mail, after 60 days lose credits claimed. (SOL)**