

# Income Tax Return Document Organizer

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## Miscellaneous Information

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

### Personal Information

**Yes**   **No**

Did your marital status change during the year?

If "Yes," explain \_\_\_\_\_

Can you or your spouse be claimed as a dependent by someone else?

Did your address change during the year?

### Dependent Information

Did you have any changes in dependents during the year?

If "Yes," explain \_\_\_\_\_

Can another person qualify to claim the child?

Did you have any childcare expenses during the year?

Did you have any adoption expenses during the year?

Did you have any children under age 19 or a full-time student under age 24 with more than \$1900 of unearned income?

Provide documentation for proof of dependent related credits (school records, medical records, daycare records, etc.)

### Health Care Information

Did any member of your household **NOT** have healthcare coverage for the entire year?

Provide copies of all Forms 1095-A, 1095-B, 1095-C for **ALL** members of your household.

If any member of your household received an exemption from the marketplace, provide the Exemption Certificate Number (ECN).

Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

### Income, Purchases, Sales, and Debt Information

Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?

Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?

Did you have any income from, or pay taxes to, a foreign country?

Did you receive any tips not reported to your employer?

Did you receive any disability income during the year?

Did you cash any U.S. Savings Bonds during the year?

Did you receive any other income not provided with this organizer?

If "Yes," explain \_\_\_\_\_

Did you start a new business or purchase any rental property during the year?

Did you sell an existing business, rental property, or other property during the year?

Did you purchase any business assets or convert any assets to business use?

If "Yes," provide the cost of the asset, the date it was placed in service, and business use percentage.

Did you purchase any gasoline, diesel, or special fuels for non-highway business use?

Did you buy or sell any stocks, bonds, or other investments during the year?

Did you sell a principal residence during the year?

If "Yes," provide closing documentation for the purchase and sale of the home

Did you foreclose or abandon a principal residence or real property during the year?

Did you refinance your principal home or second home or take out a home equity loan during the year?

If "Yes," provide all escrow, closing, and other pertinent documentation and information.

Did you receive any principal or interest, during this year, from property sold in prior years?

Did you rent out your home or use it for business?

Did you sell, exchange, or purchase any real estate during the year?

Did you acquire a new or additional interest in a partnership or S corporation?

Did you have any debts canceled or forgiven this year?

Does anyone owe you money that has become uncollectible?

Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?

If "Yes," provide the year, make, model, VIN, and date the vehicle was placed in service.

### Itemized Deduction Information

Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?

Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?

Did you receive any state or local income tax refunds from prior years?

Did you make any major purchases (vehicle, boats, etc.) during the year?

Did you pay any real estate property taxes or personal property taxes during the year?

Did you pay mortgage interest during the year?

## Miscellaneous Information

Name:

SSN:

- Did you make cash donations to charity during the year?  
  Did you make noncash donations to charity (clothes, furniture, etc.) during the year?  
  Did you donate a boat or vehicle during the year?  
 If "Yes," attach Form 1098-C.
- Did you have any job-related expenses that were not reimbursed by your employer (uniforms, safety equipment, etc.)?  
  Did you use your vehicle on the job other than for commuting to work?  
  Did you work out of town at any time during the year?  
  Did you have gambling losses during the year?

### Retirement Information

- Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year?  
  Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), myRA, or other qualified retirement plan during the year?  
  Did you receive any Social Security benefits during the year?

### Education Information

- Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?  
  Did anyone in your household attend a post-secondary school during the year?  
  Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?  
  Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?

### Miscellaneous Information

- Did you incur a loss due to damaged or stolen property?  
 If "Yes," provide the incident date, value of the property, and amount of insurance reimbursements.
- Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?  
  Did you make any gifts to any one person in excess of \$14,000 during the year?  
 If "Yes," are you splitting the gift with your spouse? \_\_\_\_\_
- Did you incur moving expenses due to a change in employment?  
  Did you make any energy-efficient improvements to your main home during the year?  
  Are you a business owner who paid health insurance premiums for your employees during the year?  
  Did you apply an overpayment of your 2015 taxes to your 2016 estimated taxes?  
  If you have an overpayment of 2016 taxes, do you want the refund applied to your 2017 estimated taxes?  
  Did you make any estimated payments toward your 2016 taxes?  
  Do you want to have any refund or balance due directly deposited or withdrawn?  
 If "Yes," provide a canceled checking or savings slip.
- Did you receive any notices from the IRS or state taxing authority?  
 If "Yes," explain \_\_\_\_\_
- May the IRS discuss your tax return with your preparer?  
  Would you like a physical copy or a PDF copy of your tax return?

### Preparer Notes

#### Miscellaneous Notes

## 2016 Comprehensive Organizer Personal and Dependent Information

### Personal Information

	Name	SSN	Date of Birth	Healthcare coverage ALL year
Taxpayer				
Spouse				
Street address, city, state, and ZIP				
	Occupation	Daytime Phone	Evening Phone	Cell Phone
Taxpayer				
Spouse				
Taxpayer Email				
Spouse Email				

#### Marital Status at end of 2016

- Married  
 Married filing separately  
 Single  
 Widow(er), Date of spouse's death if deceased in 2016 \_\_\_\_\_

#### Taxpayer

- Yes  No  
 Yes  No  
 Yes  No  
 Yes  No

#### Spouse

- Yes  No Are you blind?  
 Yes  No Are you disabled?  
 Yes  No Are you a full-time student?  
 Yes  No Do you want \$3 to go to the Presidential Election Campaign Fund?

### Dependent Information

First and last name	SSN	Relationship	Months in Home	Date of Birth	Disabled	Full-time Student	Healthcare coverage ALL year

List dependents required to file a return \_\_\_\_\_

### Estimates

	Federal		Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2015	_____	_____	_____	_____	_____	_____
First quarter	_____	_____	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____	_____	_____

### Appointment Information & Notes

Your 2016 appointment is scheduled for \_\_\_\_\_

**Notes**



**Healthcare Coverage Questionnaire for taxpayer and spouse  
( for preparer use)**

**PRIMARY TAXPAYER**

  All Year     January     February     March     April     May     June     July     August     September     October     November     December  

Insured through Marketplace (Exchange). MUST provide 1095-A														
Had health care coverage from another source														
Was exempt from health care mandate. Has Exemption Certificate Number? If yes, provide number.														
Employer offered health coverage which was declined														
If YES, what would be the cost for SELF coverage?														
If YES, what would be the cost for FAMILY coverage?														
Would the FAMILY policy have covered the spouse?														

**SPOUSE**

  All Year     January     February     March     April     May     June     July     August     September     October     November     December  

Insured through Marketplace (Exchange). MUST provide 1095-A														
Had health care coverage from another source														
Was exempt from health care mandate. Has Exemption Certificate Number? If yes, provide number.														
Employer offered health coverage which was declined														
If YES, what would be the cost for SELF coverage?														
If YES, what would be the cost for FAMILY coverage?														
Would the FAMILY policy have covered the spouse?														

### Healthcare Coverage Questionnaire for Dependents ( for preparer use)

All Year   January   February   March   April   May   June   July   August   September   October   November   December

Insured through Marketplace (Exchange). MUST provide 1095-A														
Had health care coverage from another source														
Was exempt from health care mandate. Has Exemption Certificate Number? If yes, provide number.														
Required to file a return?	YES <input type="checkbox"/> NO <input type="checkbox"/>		AGI of that return?											

All Year   January   February   March   April   May   June   July   August   September   October   November   December

Insured through Marketplace (Exchange). MUST provide 1095-A														
Had health care coverage from another source														
Was exempt from health care mandate. Has Exemption Certificate Number? If yes, provide number.														
Required to file a return?	YES <input type="checkbox"/> NO <input type="checkbox"/>		AGI of that return?											

All Year   January   February   March   April   May   June   July   August   September   October   November   December

Insured through Marketplace (Exchange). MUST provide 1095-A														
Had health care coverage from another source														
Was exempt from health care mandate. Has Exemption Certificate Number? If yes, provide number.														
Required to file a return?	YES <input type="checkbox"/> NO <input type="checkbox"/>		AGI of that return?											

### Child and Dependent Care

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

#### Child Care Provider's Information

	2016	2015
Social Security Number or Employer ID Number _____	Amount Paid _____	_____
Name _____		
Street Address _____		
City _____		Phone _____
<b>U.S. Only</b>	State, ZIP _____	
<b>Foreign Only</b>	Province/State, Country, Postal Code _____	

	2016	2015
Social Security Number or Employer ID Number _____	Amount Paid _____	_____
Name _____		
Street Address _____		
City _____		Phone _____
<b>U.S. Only</b>	State, ZIP _____	
<b>Foreign Only</b>	Province/State, Country, Postal Code _____	

	2016	2015
Social Security Number or Employer ID Number _____	Amount Paid _____	_____
Name _____		
Street Address _____		
City _____		Phone _____
<b>U.S. Only</b>	State, ZIP _____	
<b>Foreign Only</b>	Province/State, Country, Postal Code _____	

	2016	2015
Social Security Number or Employer ID Number _____	Amount Paid _____	_____
Name _____		
Street Address _____		
City _____		Phone _____
<b>U.S. Only</b>	State, ZIP _____	
<b>Foreign Only</b>	Province/State, Country, Postal Code _____	



## Wages and Salaries

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

**Attach all W-2 Form(s)**

TS \_\_\_\_\_ Employer's name and address: \_\_\_\_\_ Federal EIN \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

	2016	2015		2016	2015
Wages, tips, other compensation _____			State _____ State I.D. _____		
Federal income tax withheld _____			State wages _____		
Social Security wages _____			State income tax _____		
Social Security tax withheld _____			Locality name _____		
Medicare wages and tips _____			Local wages _____		
Medicare tax withheld _____			Local income tax _____		
Social Security tips _____			State _____ State I.D. _____		
Allocated tips _____			State wages _____		
Dependent care benefits _____			State income tax _____		
			Locality name _____		
Are you a statutory employee? _____			Local wages _____		
Are you covered by a retirement plan? _____			Local income tax _____		
Did you receive third-party sick pay? _____					

TS \_\_\_\_\_ Employer's name and address: \_\_\_\_\_ Federal EIN \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

	2016	2015		2016	2015
Wages, tips, other compensation _____			State _____ State I.D. _____		
Federal income tax withheld _____			State wages _____		
Social Security wages _____			State income tax _____		
Social Security tax withheld _____			Locality name _____		
Medicare wages and tips _____			Local wages _____		
Medicare tax withheld _____			Local income tax _____		
Social Security tips _____			State _____ State I.D. _____		
Allocated tips _____			State wages _____		
Dependent care benefits _____			State income tax _____		
			Locality name _____		
Are you a statutory employee? _____			Local wages _____		
Are you covered by a retirement plan? _____			Local income tax _____		
Did you receive third-party sick pay? _____					





**Schedule C - Profit or Loss from Business**

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

**General Information**

TS \_\_\_\_\_ Principal business product or profession \_\_\_\_\_ Business code \_\_\_\_\_

Employer I.D. number \_\_\_\_\_

Business name \_\_\_\_\_

Business address \_\_\_\_\_

City \_\_\_\_\_

**U.S. Only** State, ZIP \_\_\_\_\_

**Foreign Only** Province/State, Country, Postal Code \_\_\_\_\_

Accounting method, if not cash  Accrual  Other \_\_\_\_\_

Inventory method, if not cost  Lower of Cost or Market  Other

Change of inventory method  Yes  No

You started or acquired this business during 2016

Some investment is NOT at risk

You disposed of this property during 2016

Did you make any payments in 2016 that would require you to file Form(s) 1099?  Yes  No

If "Yes," did you or will you file all required Forms 1099?  Yes  No

**Other Information**

	2016	2015
Family health coverage . . . . .	_____	_____

**Income**

	2016	2015
Gross receipts or sales . . . . .	_____	_____
Returns and allowances . . . . .	_____	_____
Other income . . . . .	_____	_____

**Cost of Goods Sold**

	2016	2015
Inventory at beginning of the year . . . . .	_____	_____
Purchases (less cost of items withdrawn for personal use) . . . . .	_____	_____
Cost of labor . . . . .	_____	_____
Materials and supplies . . . . .	_____	_____
Other costs (list on detail worksheet) . . . . .	_____	_____
Inventory at end of year . . . . .	_____	_____

Schedule C - Profit or Loss from Business

Name:

SSN:

Expenses

TS Business name Profession or product

2016

2015

Table with columns for Expense Category, 2016, and 2015. Rows include Advertising, Car and truck expenses, Commissions and fees, Contract labor, Depletion, Employee benefit programs, Insurance (other than health), Mortgage interest (paid to banks, etc.), Other interest, Legal and professional services, Office expenses, Pension and profit sharing plans, Rent or lease (vehicles, machinery, and equipment), Rent (other business property), Repairs and maintenance, Supplies, Taxes and licenses (including real estate taxes), Travel, Total meals and entertainment, Utilities, Wages, and Other expenses (list).



Casualties and Thefts

Name:

SSN:

Description of property \_\_\_\_\_

Location of property \_\_\_\_\_

Was property  Personal  Business  Income-producing  Employee income-producing

Date acquired . . . . . \_\_\_\_\_ Fair market value before incident . . . . . \_\_\_\_\_

Cost or other basis . . . . . \_\_\_\_\_ Fair market value after incident . . . . . \_\_\_\_\_

Insurance or other reimbursement (whether or not you filed a claim) . . . . . \_\_\_\_\_ Date of incident . . . . . \_\_\_\_\_

Theft Loss Deduction for Ponzi-Type Investment Scheme

Part I Computation of Deduction

Initial investment . . . . . \_\_\_\_\_ Percentage of qualified investment . . . . . \_\_\_\_\_

Subsequent investments . . . . . \_\_\_\_\_ Actual recovery . . . . . \_\_\_\_\_

Income reported in prior years . . . . . \_\_\_\_\_ Potential insurance / SIPC recovery . . . . . \_\_\_\_\_

Withdrawals . . . . . \_\_\_\_\_

Part II Required Statements and Declarations

Information about the person or entity that conducted fraudulent arrangements

Name \_\_\_\_\_ SSN/EIN \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Description of property \_\_\_\_\_

Location of property \_\_\_\_\_

Was property  Personal  Business  Income-producing  Employee income-producing

Date acquired . . . . . \_\_\_\_\_ Fair market value before incident . . . . . \_\_\_\_\_

Cost or other basis . . . . . \_\_\_\_\_ Fair market value after incident . . . . . \_\_\_\_\_

Insurance or other reimbursement (whether or not you filed a claim) . . . . . \_\_\_\_\_ Date of incident . . . . . \_\_\_\_\_

Theft Loss Deduction for Ponzi-Type Investment Scheme

Part I Computation of Deduction

Initial investment . . . . . \_\_\_\_\_ Percentage of qualified investment . . . . . \_\_\_\_\_

Subsequent investments . . . . . \_\_\_\_\_ Actual recovery . . . . . \_\_\_\_\_

Income reported in prior years . . . . . \_\_\_\_\_ Potential insurance / SIPC recovery . . . . . \_\_\_\_\_

Withdrawals . . . . . \_\_\_\_\_

Part II Required Statements and Declarations

Information about the person or entity that conducted fraudulent arrangements

Name \_\_\_\_\_ SSN/EIN \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

### Installment Sale Income

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

TSJ \_\_\_\_\_ Description of property: \_\_\_\_\_

	2016	Prior Years
Date acquired _____ Date sold _____		
Selling price . . . . .	_____	
Mortgages assumed . . . . .	_____	
Cost of property sold . . . . .	_____	
Depreciation allowed . . . . .	_____	
Commissions and expense of sale . . . . .	_____	
Gross profit percentage . . . . .	_____	
Interest received . . . . .	_____	
Principal payments received . . . . .	_____	

TSJ \_\_\_\_\_ Description of property: \_\_\_\_\_

	2016	Prior Years
Date acquired _____ Date sold _____		
Selling price . . . . .	_____	
Mortgages assumed . . . . .	_____	
Cost of property sold . . . . .	_____	
Depreciation allowed . . . . .	_____	
Commissions and expense of sale . . . . .	_____	
Gross profit percentage . . . . .	_____	
Interest received . . . . .	_____	
Principal payments received . . . . .	_____	

TSJ \_\_\_\_\_ Description of property: \_\_\_\_\_

	2016	Prior Years
Date acquired _____ Date sold _____		
Selling price . . . . .	_____	
Mortgages assumed . . . . .	_____	
Cost of property sold . . . . .	_____	
Depreciation allowed . . . . .	_____	
Commissions and expense of sale . . . . .	_____	
Gross profit percentage . . . . .	_____	
Interest received . . . . .	_____	
Principal payments received . . . . .	_____	



**Schedule E - Income or Loss from Rental Real Estate & Royalties**

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

**General Property Information**

Property description \_\_\_\_\_  
 Address, city, state, ZIP \_\_\_\_\_

**Select the property type**

- Single family residence     
  Vacation / short-term rental     
  Land     
  Self-rental  
 Multi-family residence     
  Commercial     
  Royalties     
  Other \_\_\_\_\_

Number of days property was rented \_\_\_\_\_ Number of days property was used for personal use \_\_\_\_\_

If the rental is a multi-dwelling unit and you occupied part of the unit, what percentage did you occupy \_\_\_\_\_

- This property is your main home     
  Yes  No Payments of \$600 or more were paid to an individual who is not your employee for services provided for this rental.  
 This property was disposed of during 2016     
  Yes  No You filed Form(s) 1099 for the individual(s)  
 This property was owned as a qualified joint venture

**Income**

	2016	2015		2016	2015
Rent Income . . . . .	_____	_____	Royalties from oil, gas, mineral, copyright or patent . . . . .	_____	_____
Rental income from Form 1099-MISC	_____	_____	Royalties from Form 1099(s)-MISC	_____	_____

**Expenses**

	Rental unit expenses		Rental <u>and</u> homeowner expenses		
Advertising . . . . .	_____	_____	_____	_____	If this Schedule E is for a multi-unit dwelling and you lived in one unit and rented out the other units, use the "Rental and homeowner expenses" column to show expenses that apply to the entire property. Use the "Rental unit expenses" column to show expenses that pertain ONLY to the rental portion of the property.
Auto & travel . . . . .	_____	_____	_____	_____	
Cleaning & maintenance . . . . .	_____	_____	_____	_____	
Commissions . . . . .	_____	_____	_____	_____	
Depletion . . . . .	_____	_____	_____	_____	
Insurance . . . . .	_____	_____	_____	_____	
Legal & professional fees . . . . .	_____	_____	_____	_____	
Management fees . . . . .	_____	_____	_____	_____	
Interest - mortgage . . . . .	_____	_____	_____	_____	
Interest - other . . . . .	_____	_____	_____	_____	
Repairs . . . . .	_____	_____	_____	_____	If the Schedule E is not for a multi-unit property in which you lived in one unit, complete just the "Rental unit expenses" column.
Supplies . . . . .	_____	_____	_____	_____	
Taxes . . . . .	_____	_____	_____	_____	
Utilities . . . . .	_____	_____	_____	_____	
Other expenses	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	



Form 4835 - Farm Rental Income and Expenses

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

**General Information**

Description \_\_\_\_\_ Employer ID Number \_\_\_\_\_

This farm was disposed of during 2016

This farm received applicable subsidy during 2016

**Income**

	2016	2015		2016	2015
Income from production of livestock, grains, and other crops . . . . .	_____	_____	Other income . . . . .	_____	_____
Total cooperative distributions . . . . .	_____	_____		_____	_____
Total agricultural payments . . . . .	_____	_____		_____	_____
Commodity Credit Corporation (CCC) loans:					
CCC loans reported . . . . .	_____	_____		_____	_____
CCC loans forfeited . . . . .	_____	_____		_____	_____
Crop insurance proceeds:					
Amount received in 2016 . . . . .	_____	_____		_____	_____
<input type="checkbox"/> You elect to defer to next year					
Amount deferred from last year . . . . .	_____	_____		_____	_____

**Expenses**

	2016	2015		2016	2015
Car & truck expenses . . . . .	_____	_____	Seeds & plants purchased . . . . .	_____	_____
Chemicals . . . . .	_____	_____	Storage & warehousing . . . . .	_____	_____
Conservation expenses . . . . .	_____	_____	Supplies purchased . . . . .	_____	_____
Custom hire (machine work) . . . . .	_____	_____	Taxes . . . . .	_____	_____
Employee benefit programs . . . . .	_____	_____	Utilities . . . . .	_____	_____
Feed purchased . . . . .	_____	_____	Veterinary, breeding, & medicine . . . . .	_____	_____
Fertilizers & lime . . . . .	_____	_____	Other expenses		
Freight & trucking . . . . .	_____	_____		_____	_____
Gasoline, fuel, & oil . . . . .	_____	_____		_____	_____
Insurance (other than health) . . . . .	_____	_____		_____	_____
Interest - mortgage (paid to banks, etc.)	_____	_____		_____	_____
Interest - other: . . . . .	_____	_____		_____	_____
Labor hired (less jobs credit) . . . . .	_____	_____		_____	_____
Pension & profit-sharing plans . . . . .	_____	_____		_____	_____
Rent - vehicles, machinery & equip . . . . .	_____	_____		_____	_____
Rent - other (land, animals, etc.) . . . . .	_____	_____		_____	_____
Repairs & maintenance . . . . .	_____	_____		_____	_____

**Schedule F - Profit or Loss from Farming**

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

**General Information**

Principal product \_\_\_\_\_ Employer ID Number \_\_\_\_\_

- This farm was disposed of during 2016  Yes  No Payments of \$600 or more were paid to an individual who is not your employee for services provided for this farm
- This farm received government subsidy in 2016  Yes  No You filed Form(s) 1099 for the individual(s)

**Income**

	2016	2015		2016	2015
Sales of livestock / other items . . . . .	_____	_____	Beginning inventory for accrual . . . . .	_____	_____
Cost of items bought for resale . . . . .	_____	_____	Ending inventory for accrual . . . . .	_____	_____
Sale of products you raised . . . . .	_____	_____	<input type="checkbox"/> You used unit-livestock-price or farm-price inventory method		
Total cooperative distributions . . . . .	_____	_____	Other income . . . . .	_____	_____
Total agricultural payments . . . . .	_____	_____			
Commodity Credit Corporation (CCC) loans:					
CCC loans reported . . . . .	_____	_____			
CCC loans forfeited . . . . .	_____	_____			
Crop insurance proceeds:					
Amount received in 2016 . . . . .	_____	_____			
<input type="checkbox"/> You elect to defer to next year					
Amount deferred from last year . . . . .	_____	_____			
Custom hire income . . . . .	_____	_____			

**Expenses**

	2016	2015		2016	2015
Car & truck expenses . . . . .	_____	_____	Seeds & plants purchased . . . . .	_____	_____
Chemicals . . . . .	_____	_____	Storage & warehousing . . . . .	_____	_____
Conservation expenses . . . . .	_____	_____	Supplies purchased . . . . .	_____	_____
Custom hire (machine work) . . . . .	_____	_____	Taxes . . . . .	_____	_____
Employee benefit programs . . . . .	_____	_____	Utilities . . . . .	_____	_____
Feed purchased . . . . .	_____	_____	Veterinary, breeding, & medicine . . . . .	_____	_____
Fertilizers & lime . . . . .	_____	_____	Other expenses . . . . .	_____	_____
Freight & trucking . . . . .	_____	_____			
Gasoline, fuel, & oil . . . . .	_____	_____			
Insurance (other than health) . . . . .	_____	_____			
Interest - mortgage (paid to banks, etc.)	_____	_____			
Interest - other . . . . .	_____	_____			
Labor hired (less jobs credit) . . . . .	_____	_____			
Pension & profit-sharing plans . . . . .	_____	_____			
Rent - vehicles, machinery, & equip . . . . .	_____	_____			
Rent - other (land, animals, etc.) . . . . .	_____	_____			
Repairs & maintenance . . . . .	_____	_____			

Form 1099-G Unemployment Compensation

Name:

SSN:

TSJ \_\_\_\_\_ Payer's Federal I.D. Number: \_\_\_\_\_

Payer's name: \_\_\_\_\_

Payer's address: \_\_\_\_\_

City: \_\_\_\_\_

U.S. Only State, ZIP: \_\_\_\_\_

Foreign Only Province/State, Country, Postal Code: \_\_\_\_\_

Payer's phone: \_\_\_\_\_

Account number: \_\_\_\_\_

	2016	2015		2016	2015
Unemployment compensation . . .	_____	_____	<input type="checkbox"/> Trade/business		
Unemployment compensation repaid in current year . . . . .	_____	_____	Market gain . . . . .	_____	_____
State/local tax refunds/credits . .	_____	_____	State _____ State I.D. _____	_____	
Tax year . . . . .	_____	_____	State unemployment . . . . .	_____	_____
Federal tax withheld . . . . .	_____	_____	State withholding . . . . .	_____	_____
RTAA payments . . . . .	_____	_____	<input type="checkbox"/> Unemployment benefits are from railroad		
Taxable grants . . . . .	_____	_____			
Agriculture . . . . .	_____	_____			

TSJ \_\_\_\_\_ Payer's Federal I.D. Number: \_\_\_\_\_

Payer's name: \_\_\_\_\_

Payer's address: \_\_\_\_\_

City: \_\_\_\_\_

U.S. Only State, ZIP: \_\_\_\_\_

Foreign Only Province/State, Country, Postal Code: \_\_\_\_\_

Payer's phone: \_\_\_\_\_

Account number: \_\_\_\_\_

	2016	2015		2016	2015
Unemployment compensation . . .	_____	_____	<input type="checkbox"/> Trade/business		
Unemployment compensation repaid in current year . . . . .	_____	_____	Market gain . . . . .	_____	_____
State/local tax refunds/credits . .	_____	_____	State _____ State I.D. _____	_____	
Tax year . . . . .	_____	_____	State unemployment . . . . .	_____	_____
Federal tax withheld . . . . .	_____	_____	State withholding . . . . .	_____	_____
RTAA payments . . . . .	_____	_____	<input type="checkbox"/> Unemployment benefits are from railroad		
Taxable grants . . . . .	_____	_____			
Agriculture . . . . .	_____	_____			

Form 1099-MISC

Name:

SSN:

Please attach all Form(s) 1099 MISC

TS \_\_\_\_ For \_\_\_\_ Payer's Federal ID number: \_\_\_\_\_

Payer's name: \_\_\_\_\_

Address: \_\_\_\_\_

	2016	2015		2016	2015
Rents . . . . .	_____	_____	State _____ State I.D. _____	_____	_____
Royalties . . . . .	_____	_____	State tax withheld . . . . .	_____	_____
Other income . . . . .	_____	_____	State income . . . . .	_____	_____
Description _____			Name of locality _____		
Federal tax withheld . . . . .	_____	_____	Local tax withheld . . . . .	_____	_____
Fishing boat proceeds . . . . .	_____	_____	Local income . . . . .	_____	_____
Medical and health care payments . . . . .	_____	_____	State _____ State I.D. _____	_____	_____
Non-employee compensation . . . . .	_____	_____	State tax withheld . . . . .	_____	_____
Substitute payments . . . . .	_____	_____	State income . . . . .	_____	_____
<input type="checkbox"/> Payer made direct sales of \$5,000 or more of consumer products			Name of locality _____		
Crop insurance proceeds . . . . .	_____	_____	Local tax withheld . . . . .	_____	_____
Excess golden parachute . . . . .	_____	_____	Local income . . . . .	_____	_____
Gross attorney proceeds . . . . .	_____	_____			
Taxable Proceeds . . . . .	_____	_____			
Section 409A deferrals . . . . .	_____	_____			
Section 409A income . . . . .	_____	_____			

**Pension, Annuities, Retirement, Etc. Distributions**

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

**Please attach all Form(s) 1099-R, SSA statements, etc.**

TS \_\_\_\_\_ Payer's name: \_\_\_\_\_

Payer's Federal ID Number: \_\_\_\_\_

Address: \_\_\_\_\_

	2016	2015	State _____ State I.D. _____	2016	2015
Disability indicator . . . . .	<input type="checkbox"/>	<input type="checkbox"/>	State income tax withheld . . . . .	_____	_____
Report as wages on 1040 . . . . .	<input type="checkbox"/>	<input type="checkbox"/>	State distribution . . . . .	_____	_____
Gross distribution . . . . .	_____	_____	Name of locality _____	_____	_____
Taxable amount . . . . .	_____	_____	Local income tax withheld . . . . .	_____	_____
Total distribution . . . . .	<input type="checkbox"/>	<input type="checkbox"/>	Local distribution . . . . .	_____	_____
Capital gain . . . . .	_____	_____	State _____ State I.D. _____	_____	_____
Federal income tax withheld . . . . .	_____	_____	State income tax withheld . . . . .	_____	_____
Employee contributions or insurance premiums . . . . .	_____	_____	State distribution . . . . .	_____	_____
Distribution code(s) . . . . .	_____	_____	Name of locality _____	_____	_____
IRA/SEP/SIMPLE . . . . .	<input type="checkbox"/>	<input type="checkbox"/>	Local income tax withheld . . . . .	_____	_____
Your percentage of total distribution	_____	_____	Local distribution . . . . .	_____	_____

TS \_\_\_\_\_ Payer's name: \_\_\_\_\_

Payer's Federal ID Number: \_\_\_\_\_

Address: \_\_\_\_\_

	2016	2015	State _____ State I.D. _____	2016	2015
Disability indicator . . . . .	<input type="checkbox"/>	<input type="checkbox"/>	State income tax withheld . . . . .	_____	_____
Report as wages on 1040 . . . . .	<input type="checkbox"/>	<input type="checkbox"/>	State distribution . . . . .	_____	_____
Gross distribution . . . . .	_____	_____	Name of locality _____	_____	_____
Taxable amount . . . . .	_____	_____	Local income tax withheld . . . . .	_____	_____
Total distribution . . . . .	<input type="checkbox"/>	<input type="checkbox"/>	Local distribution . . . . .	_____	_____
Capital gain . . . . .	_____	_____	State _____ State I.D. _____	_____	_____
Federal income tax withheld . . . . .	_____	_____	State income tax withheld . . . . .	_____	_____
Employee contributions or insurance premiums . . . . .	_____	_____	State distribution . . . . .	_____	_____
Distribution code(s) . . . . .	_____	_____	Name of locality _____	_____	_____
IRA/SEP/SIMPLE . . . . .	<input type="checkbox"/>	<input type="checkbox"/>	Local income tax withheld . . . . .	_____	_____
Your percentage of total distribution	_____	_____	Local distribution . . . . .	_____	_____

**Social Security Benefit Statement**

TS \_\_\_\_\_

2016

2015

TS \_\_\_\_\_

2016

2015

Net benefits . . . . .	_____	_____	Net benefits . . . . .	_____	_____
Medicare premiums . . . . .	_____	_____	Medicare premiums . . . . .	_____	_____
Income tax withheld . . . . .	_____	_____	Income tax withheld . . . . .	_____	_____

## Adjustments

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

### Moving Expenses

	2016	2015
TSJ _____		
Enter the number of miles from your OLD home to your NEW workplace . . . . .	_____	_____
Enter the number of miles from your OLD home to your OLD workplace . . . . .	_____	_____
Enter the amount you paid for transportation and storage of household goods and personal effects . . . . .	_____	_____
Enter the amount you paid for travel and lodging incurred during move (do NOT include cost of meals) . . . . .	_____	_____
Enter the amount of moving expenses reimbursed to you by your employer . . . . .	_____	_____
Was this a military move? <input type="checkbox"/> Yes		

### Self-Employed Health Insurance

	2016	2015
TSJ _____		
Enter the qualified long term care amount . . . . .	_____	_____
Enter your Medicare wages from an S corporation . . . . .	_____	_____

### Self-Employed Pensions

	2016	2015
TSJ _____		
Enter your plan contribution rate as a decimal . . . . .	_____	_____
Enter your allowable elective deferrals made during 2016 . . . . .	_____	_____
Enter your catch-up contributions . . . . .	_____	_____
Enter the amount of designated ROTH contributions included above . . . . .	_____	_____

### Nondeductible IRAs

	2016	2015
TS _____		
Total traditional IRA contributions made for 2016 . . . . .	_____	_____
Total basis in traditional IRAs as of 12/31/2016 . . . . .	_____	_____
Distributions you received from traditional, SEP, and Simple IRAs. (Do not include rollovers) . . . . .	_____	_____
Amount of traditional IRAs converted to ROTH IRAs . . . . .	_____	_____
IRA basis before conversion . . . . .	_____	_____
Total ROTH IRA contributions made for 2016 . . . . .	_____	_____

### Health Savings Account

	2016	2015
TSJ _____		
HSA contributions made for 2016 . . . . .	_____	_____
Total distributions from all HSAs during 2016 . . . . .	_____	_____
Distributions included above that were rolled over . . . . .	_____	_____
Qualified medical expenses paid using HSA distributions . . . . .	_____	_____



Noncash Charitable Contributions

Name:

SSN:

TSJ \_\_\_\_\_ Donee I.D. \_\_\_\_\_

Name of donee organization \_\_\_\_\_

Address of donee organization \_\_\_\_\_

City \_\_\_\_\_

U.S. Only State, ZIP \_\_\_\_\_

Foreign Only Province/State, Country, Postal Code \_\_\_\_\_

Description of donated property \_\_\_\_\_ Donor's cost or adjusted basis \_\_\_\_\_

Valuation method used \_\_\_\_\_ Fair market value \_\_\_\_\_

Physical condition of donated property \_\_\_\_\_ Average security price \_\_\_\_\_

How was it acquired? \_\_\_\_\_ Bargain sale price \_\_\_\_\_

Date acquired \_\_\_\_\_  Capital gain property

Date contributed \_\_\_\_\_

Property Type (if over \$5,000)  Donated property is publicly traded security

- Art valued more than \$20,000, Equipment, Collectibles, Qualified conservation - qualified farmer/rancher, Art valued less than \$20,000, Intellectual Property, Qualified conservation - non-qualified farmer/rancher, Other real estate, Vehicles, Qualified conservation, Securities, Other

TSJ \_\_\_\_\_ Donee I.D. \_\_\_\_\_

Name of donee organization \_\_\_\_\_

Address of donee organization \_\_\_\_\_

City \_\_\_\_\_

U.S. Only State, ZIP \_\_\_\_\_

Foreign Only Province/State, Country, Postal Code \_\_\_\_\_

Description of donated property \_\_\_\_\_ Donor's cost or adjusted basis \_\_\_\_\_

Valuation method used \_\_\_\_\_ Fair market value \_\_\_\_\_

Physical condition of donated property \_\_\_\_\_ Average security price \_\_\_\_\_

How was it acquired? \_\_\_\_\_ Bargain sale price \_\_\_\_\_

Date acquired \_\_\_\_\_  Capital Gain property

Date contributed \_\_\_\_\_

Property Type (if over \$5,000)  Donated property is publicly traded security

- Art valued more than \$20,000, Equipment, Collectibles, Qualified conservation - qualified farmer/rancher, Art valued less than \$20,000, Intellectual Property, Qualified conservation - non-qualified farmer/rancher, Other real estate, Vehicles, Qualified conservation, Securities, Other

## Other Income and Adjustments

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

### Other Income

	2016 Taxpayer	2015 Taxpayer	2016 Spouse	2015 Spouse
Scholarships or grants not reported on Form W-2 . . . . .	_____	_____	_____	_____
State income tax refund (attach Forms 1099-G) . . . . .	_____	_____	_____	_____
Alimony received . . . . .	_____	_____	_____	_____
Unemployment compensation (attach Forms 1099-G) . . . . .	_____	_____	_____	_____
Unemployment compensation repaid in 2016 . . . . .	_____	_____	_____	_____
Social Security benefits (attach Forms 1099-SSA) . . . . .	_____	_____	_____	_____
Railroad retirement benefits (attach Forms 1099-RRB) . . . . .	_____	_____	_____	_____
Gambling winnings (attach Forms W2-G) . . . . .	_____	_____	_____	_____
Alaska Permanent Fund . . . . .	_____	_____	_____	_____
Other income: _____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

### Adjustments

	2016 Taxpayer	2015 Taxpayer	2016 Spouse	2015 Spouse
Educator expenses (If you are an educator, enter the amount you paid for classroom supplies) . . . . .	_____	_____	_____	_____
Contributions made to a Health Savings Account (HSA) . . . . .	_____	_____	_____	_____
Contributions made to a Self-Employed Pension plan (SEP) . . . . .	_____	_____	_____	_____
Payments made for Self-Employed Health Insurance for you, your spouse, or dependents . . . . .	_____	_____	_____	_____
Alimony paid		_____		_____
Name: _____ SSN: _____	_____	_____	_____	_____
Name: _____ SSN: _____	_____	_____	_____	_____
Contributions made to an Individual Retirement Account (IRA) . . . . .	_____	_____	_____	_____
Contributions made to a Roth IRA . . . . .	_____	_____	_____	_____
Contributions made to a myRA . . . . .	_____	_____	_____	_____
Interest paid on a student loan . . . . .	_____	_____	_____	_____
Other adjustments: _____	_____	_____	_____	_____



### Mortgage Interest

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

**Provide all copies of Form 1098**

TSJ \_\_\_\_\_ For \_\_\_\_\_ Business name \_\_\_\_\_ Product \_\_\_\_\_

Recipient/Lender Information: \_\_\_\_\_ Federal ID # \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

	2016	2015		2016	2015
Mortgage interest received . . . . .	_____	_____	Mortgage insurance premiums . .	_____	_____
Points paid . . . . .	_____	_____	Real estate taxes paid . . . . .	_____	_____
Refund overpaid interest . . . . .	_____	_____	Account number _____		

TSJ \_\_\_\_\_ For \_\_\_\_\_ Business name \_\_\_\_\_ Product \_\_\_\_\_

Recipient/Lender Information: \_\_\_\_\_ Federal ID # \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

	2016	2015		2016	2015
Mortgage interest received . . . . .	_____	_____	Mortgage insurance premiums . .	_____	_____
Points paid . . . . .	_____	_____	Real estate taxes paid . . . . .	_____	_____
Refund overpaid interest . . . . .	_____	_____	Account number _____		

TSJ \_\_\_\_\_ For \_\_\_\_\_ Business name \_\_\_\_\_ Product \_\_\_\_\_

Recipient/Lender Information: \_\_\_\_\_ Federal ID # \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

	2016	2015		2016	2015
Mortgage interest received . . . . .	_____	_____	Mortgage insurance premiums . .	_____	_____
Points paid . . . . .	_____	_____	Real estate taxes paid . . . . .	_____	_____
Refund overpaid interest . . . . .	_____	_____	Account number _____		

TSJ \_\_\_\_\_ For \_\_\_\_\_ Business name \_\_\_\_\_ Product \_\_\_\_\_

Recipient/Lender Information: \_\_\_\_\_ Federal ID # \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

	2016	2015		2016	2015
Mortgage interest received . . . . .	_____	_____	Mortgage insurance premiums . .	_____	_____
Points paid . . . . .	_____	_____	Real Estate taxes paid . . . . .	_____	_____
Refund overpaid interest . . . . .	_____	_____	Account number _____		

## Employee Business Expense

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

### Employee Business Expense

TSJ \_\_\_\_\_ Occupation \_\_\_\_\_

#### Part I - Employee Business Expense and Reimbursements

	2016	2015
Rural mail carrier . . . . .	_____	_____
Parking fees, tolls, and local transportation, including train, bus, etc. . . . .	_____	_____
Travel expense while away from home overnight, including lodging, airplane, car rental, etc. <b>Do not</b> include meals and entertainment . . . . .	_____	_____
Other business expenses . . . . .	_____	_____
Meals and entertainment expenses . . . . .	_____	_____
DOT meals . . . . .	_____	_____
Enter reimbursements received from your employer that were <b>not</b> reported to you in box 1 of Form W-2. Include any amount reported under code "L" in box 12 on your Form W-2 for . . . . .	_____	_____
Other business expenses . . . . .	_____	_____
Meals and entertainment expenses . . . . .	_____	_____
Portion of total expenses that is for impairment-related work expenses of disabled employee . . . . .	_____	_____
Portion of total expenses that is for an Armed Forces reservist . . . . .	_____	_____
<input type="checkbox"/> Qualifying performing artist <input type="checkbox"/> Fee-based state or local government official <input type="checkbox"/> Pastor		

### Business Vehicle Expenses

	Vehicle 1		Vehicle 2	
	2016	2015	2016	2015
Enter the date vehicle was placed in service . . . . .	_____	_____	_____	_____
Total miles vehicle was driven during 2016 . . . . .	_____	_____	_____	_____
Business miles . . . . .	_____	_____	_____	_____
Average daily roundtrip commuting distance . . . . .	_____	_____	_____	_____
Commuting miles included in total miles above . . . . .	_____	_____	_____	_____
Taxes . . . . .	_____	_____	_____	_____
Gasoline, oil, repairs, vehicle insurance, etc. . . . .	_____	_____	_____	_____
Vehicle rentals . . . . .	_____	_____	_____	_____
Inclusion amount . . . . .	_____	_____	_____	_____
Value of employer-provided vehicle (applies only if 100% annual lease value was included on Form W-2) . . . . .	_____	_____	_____	_____
Enter cost or other basis . . . . .	_____	_____	_____	_____
Enter section 179 deduction . . . . .	_____	_____	_____	_____
Enter depreciation method and percentage . . . . .	_____	_____	_____	_____
If your employer provided a vehicle, was personal use during off duty hours permitted? . . . . .	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
Do you or your spouse have another vehicle available for personal use? . . . . .	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
Do you have evidence to support your deduction? . . . . .	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
If "Yes", is the evidence written? . . . . .	<input type="checkbox"/> Yes	<input type="checkbox"/> No		

## Auto Expense Worksheet

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

For \_\_\_\_\_

Business name and Profession/Product \_\_\_\_\_

Description \_\_\_\_\_

Date placed in service \_\_\_\_\_

Do you or your spouse have another vehicle available for personal use?     Yes     No

Was this your vehicle available for use during off-duty hours?     Yes     No

Do you have evidence to support your deduction?     Yes     No

If "Yes," is the evidence written?     Yes     No

	2016	2015		Prior Year Total
<b>a</b> Business . . . . .			Business	
<b>b</b> Commuting . . . . .			Total	
<b>c</b> Other . . . . .				

### Expenses

	2016	2015
Garage rent . . . . .		
Gas . . . . .		
Insurance . . . . .		
Licenses . . . . .		
Oil . . . . .		
Parking fees . . . . .		
Lease payments . . . . .		
Interest . . . . .		
Property tax . . . . .		
Repairs . . . . .		
Tires . . . . .		
Tolls . . . . .		
Other expenses (list):	Apply Business %	
_____	<input type="checkbox"/>	
_____	<input type="checkbox"/>	
_____	<input type="checkbox"/>	

## Expenses for Business Use of Your Home

Name: \_\_\_\_\_

SSN: \_\_\_\_\_

### Business Use of Home

TSJ \_\_\_\_\_ For \_\_\_\_\_

	2016	2015
Square feet of home used exclusively for business . . . . .		
Total square feet of home . . . . .		

### Use of Home for Daycare

	2016	2015
Area used part time for business . . . . .		
Total hours used for daycare . . . . .		
Total hours available . . . . .		

Did you live in the home all year?  Yes  No

### Expenses

	Office expenses		Home expenses		
	2016	2015	2016	2015	
Mortgage interest . . . . .					In the "Office expenses" column, enter those expenses that pertain exclusively to your office; in the "Home expenses" column, enter those expenses that pertain to the entire dwelling.
Real estate taxes . . . . .					
Excess mortgage interest . . . . .					
Insurance . . . . .					
Rent . . . . .					
Repairs & maintenance . . . . .					
Utilities . . . . .					
Other expenses . . . . .					

### Cost of Home

	2016	2015
Enter the <b>smaller</b> of your home's adjusted basis or its fair market value . . . . .		
Does this include the value of the land? <input type="checkbox"/> Yes <input type="checkbox"/> No . . . . . Value of land		
Date placed in service . . . . .		
Date taken out of service . . . . .		





Residential Energy Credits

Name:

SSN:

TSJ \_\_\_\_\_

Residential Energy Efficient Property Credit

Qualified solar electric property costs . . . . . \_\_\_\_\_

Qualified solar water heating property costs . . . . . \_\_\_\_\_

Qualified small wind energy property costs . . . . . \_\_\_\_\_

Qualified geothermal heat pump property costs . . . . . \_\_\_\_\_

Was qualified fuel cell property installed on or in your main home in US?  Yes  No

Address of main home \_\_\_\_\_

City, State, ZIP \_\_\_\_\_

Qualified fuel cell property costs . . . . . \_\_\_\_\_

Kilowatt capacity of property on line 22 . . . . . \_\_\_\_\_

Amount of unused credit from 2015 Form 5695, line 28 . . . . . \_\_\_\_\_

Were improvements or costs made to your main home located in the US?  Yes  No

Address of main home \_\_\_\_\_

City, State, ZIP \_\_\_\_\_

Were improvements or costs related to the construction of this main home?  Yes  No

Enter the nonbusiness energy property credit that you took in:

2006 \_\_\_\_\_ 2009 \_\_\_\_\_ 2011 \_\_\_\_\_ 2013 \_\_\_\_\_ 2015 \_\_\_\_\_

2007 \_\_\_\_\_ 2010 \_\_\_\_\_ 2012 \_\_\_\_\_ 2014 \_\_\_\_\_

Qualified energy efficient improvements

Insulation material or systems primarily designed to reduce heat loss or gain . . . . . \_\_\_\_\_

Exterior doors that meet or exceed Energy Star requirements . . . . . \_\_\_\_\_

Metal or asphalt roof with appropriate pigmented coatings designed to reduce heat gain . . . . . \_\_\_\_\_

Exterior windows and skylights that meet or exceed Energy Star requirements . . . . . \_\_\_\_\_

Enter the amount of window expense you claimed in:

2006 \_\_\_\_\_ 2009 \_\_\_\_\_ 2011 \_\_\_\_\_ 2013 \_\_\_\_\_ 2015 \_\_\_\_\_

2007 \_\_\_\_\_ 2010 \_\_\_\_\_ 2012 \_\_\_\_\_ 2014 \_\_\_\_\_

Residential energy property costs

Energy efficient building property costs . . . . . \_\_\_\_\_

Qualified natural gas, propane, or oil furnace or hot water boiler . . . . . \_\_\_\_\_

Advanced main air circulating fan used in a natural gas, propane, or oil furnace . . . . . \_\_\_\_\_

Education Credits and Deduction

Name:

SSN:

Provide all Form(s) 1098-T

Student's first and last name: \_\_\_\_\_ SSN: \_\_\_\_\_

Yes

Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of "four times" in any prior years? . . . . .

Was the student enrolled at least half time for at least one academic period that began in 2016 at an eligible education institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary educational credential? . . . . .

Did the student complete the first four years of post-secondary education before 2016? . . . . .

Was the student convicted, before the end of 2016, of a felony for possession or distribution of a controlled substance? . . . . .

Is the student pursuing a degree? . . . . .

Number of years the American Opportunity Credit has been claimed for this student \_\_\_\_\_

Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution . . . . . \_\_\_\_\_

ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution . . . . . \_\_\_\_\_

Tax-free education assistance received in 2016 allocable to the academic period . . . . . \_\_\_\_\_

Tax-free education assistance received in 2017 (and before 2016 return is filed) allocable to the academic period . . . . . \_\_\_\_\_

Refunds of qualified education expenses paid in 2016 if the refund is received before the 2016 return is filed . . . . . \_\_\_\_\_

Educational Institution Name: \_\_\_\_\_

Educational Institution Name: \_\_\_\_\_

Student's first and last name: \_\_\_\_\_ SSN: \_\_\_\_\_

Yes

Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of "four times" in any prior years? . . . . .

Was the student enrolled at least half time for at least one academic period that began in 2016 at an eligible education institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary educational credential? . . . . .

Did the student complete the first four years of post-secondary education before 2016? . . . . .

Was the student convicted, before the end of 2016, of a felony for possession or distribution of a controlled substance? . . . . .

Is the student pursuing a degree? . . . . .

Number of years the American Opportunity Credit has been claimed for this student \_\_\_\_\_

Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution . . . . . \_\_\_\_\_

ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution . . . . . \_\_\_\_\_

Tax-free education assistance received in 2016 allocable to the academic period . . . . . \_\_\_\_\_

Tax-free education assistance received in 2017 (and before 2016 return is filed) allocable to the academic period . . . . . \_\_\_\_\_

Refunds of qualified education expenses paid in 2016 if the refund is received before the 2016 return is filed . . . . . \_\_\_\_\_

Educational Institution Name: \_\_\_\_\_

Educational Institution Name: \_\_\_\_\_

### Energy Credits

Name:

SSN:

#### Form 8936 - Qualified Plug-in Electric Drive Motor Vehicle Credit

TSJ _____	Vehicle 1	Vehicle 2
Year of vehicle . . . . .	_____	_____
Make of vehicle . . . . .	_____	_____
Model of vehicle . . . . .	_____	_____
How many wheels does the vehicle have? . . . . .	_____	_____
Vehicle Identification Number . . . . .	_____	_____
Date vehicle was placed in service . . . . .	_____	_____
Tentative credit . . . . .	_____	_____
Business/investment use percentage . . . . .	_____	_____
Section 179 expense deduction . . . . .	_____	_____

#### Form 8910 - Alternative Motor Vehicle Credit

TSJ _____	Vehicle 1	Vehicle 2
Year of vehicle . . . . .	_____	_____
Make of vehicle . . . . .	_____	_____
Model of vehicle . . . . .	_____	_____
Vehicle Identification Number . . . . .	_____	_____
Date vehicle was placed in service . . . . .	_____	_____
Maximum credit allowable . . . . .	_____	_____
Business/investment use percentage . . . . .	_____	_____



