

WORKSHEET FOR PREPARING 2018 INDIVIDUAL INCOME TAX RETURNS

Taxpayer (T) Name _____

Spouse (S) Name _____

How many months did you have health insurance? _____

How many months did you have health insurance? _____

Are you or your spouse legally blind? _____

****Please complete if there are any changes from prior year tax return or if you are a new client.**

Occupation _____

Occupation _____

Date of Birth ___/___/___ SS # ___ - ___ - _____

Date of Birth ___/___/___ SS # ___ - ___ - _____

Address _____

County _____ (T) _____ (S) _____

School District of residence on 12/31/18 _____

Telephone: (Home) _____

Email _____

(Work) _____

May we email confidential information? Yes/No

(Cell) _____

Children and others who are your dependents:

Grades K-12
Supplies for

<u>Full Legal Name & Relationship</u>	<u>Date of Birth mm/dd/yr</u>	<u>Social Security Number</u>	<u>Supplies for School Activities, Book Fees, and Tuition</u>	<u>Dependent's Income*</u>		<u># of Months Covered By Health Ins.</u>
				<u>Wages and Other Income</u>	<u>Dividends & Interest</u>	
_____	//	_____	_____	_____	_____	_____
_____	//	_____	_____	_____	_____	_____
_____	//	_____	_____	_____	_____	_____
_____	//	_____	_____	_____	_____	_____

***PLEASE PROVIDE DEPENDENT'S W-2'S, 1098-T'S, 1098-Q's, 1099'S AND/OR TAX RETURN.**

-Will your return be signed by your authorized power of attorney? If so, **please provide a copy.** Yes/No

-Does any person who is not your child live with you **OR** do you provide housing for a dependent parent? Yes/No

PLEASE LIST ANY OTHER INCOME NOT PROVIDED ON W-2'S, 1099'S AND K-1'S. NOTE: If you received INTEREST on a real estate contract, please list the NAME, ADDRESS, and SOCIAL SECURITY NUMBER of the PAYER and include the amount of principal received.

<u>From Whom Received</u>	<u>Amount</u>	<u>For What</u>
_____	_____	_____
_____	_____	_____

PLEASE ANSWER THE FOLLOWING QUESTIONS AND PROVIDE DETAILS AS REQUIRED:

1. Do you have an Identity Protection Personal Identification Number (IP PIN) issued by the IRS for ID theft? # _____
2. Do / Did you have a foreign bank account? _____
3. Did you convert a regular IRA to a Roth IRA? _____ (Provide details.)
4. Did you buy or sell your residence during this year? _____ (Please provide closing statement.)
5. Please check here if you do **not** want to allow the IRS to discuss your tax return with us. _____
6. If you would like your refund(s) direct deposited, check here _____ and provide a voided check **AND/OR** If you would like your tax due automatically withdrawn, check here _____ and provide a voided check.
7. Limited energy credits may be available. Please provide details of energy efficiency improvements to your home.

****If you or your spouse wish to participate in one of the Iowa Checkoff Funds please let us know.**

Any questions or comments: _____

I (we) have disclosed to Henkel & Associates, P.C. all of my (our) income and deductions and have documents to support all the information provided. I understand that I am responsible for retaining this documentation. Henkel & Associates, P.C.'s liability is limited to 100% of the fees for preparing the tax return.

Taxpayer Signature _____

Spouse Signature _____