WORKSHEET FOR PREPARING 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 _______________ Telephone: (Home) _______________ _______________

Email ____ (Work) _______________ _______________

May we email confidential information? Yes/No (Cell) _______________ _______________

Children and others who are your dependents:

Full Legal Name & Relationship	**Date of Birth mm/dd/yr**	**Social Security Number**	**Grades K-12 Supplies for School Activities, Book Fees, and Tuition**	**Dependent's Income*: Wages and Other Income**	**Dependent's Income*: Dividends & Interest**	**# of Months Covered By Health Ins.**
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***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.

From Whom Received	**Amount**	**For What**

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__________________________________