

You are responsible for the information on your return so please provide complete and accurate information to Affordable Income Tax.

You will need your:

- Tax information such as Forms W-2s, 1099s, 1098, 1095 for 2018, and **ALL** letters received from the IRS
- Social security cards or ITIN letters for you and all persons on your tax return. **(Copies only)**
- Picture ID (such as a valid driver's license/ government issued ID for you and your spouse, if applicable). **(Copies only)**
- **New Clients - Please complete the entire form & attach supporting documentation. (Attach a copy of your 2017 tax return)**
- **Returning Clients – Report any changes/updates from last year and complete all other sections applicable.**

Part I. Your Personal Information (If you are filing a joint return, enter your names in the same order as last year's return)

1. Your First Name	M. I.	Last Name	Are you a U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	
2. Your Spouse's First Name	M. I.	Last Name	Is your spouse a U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	
3. Mailing Address		Apt#	City	State Zip Code
4. Contact Information				
Home Phone:		Cell Phone:	E-mail:	
5. Your Date of Birth	6. Your Job Title	Are you:	7. Full-time Student?	<input type="checkbox"/> Yes <input type="checkbox"/> No
			8. Totally and Permanently Disabled?	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Your Spouse's Date of Birth	10. Your Spouse's Job Title	Is Your Spouse:	11. Full-time Student?	<input type="checkbox"/> Yes <input type="checkbox"/> No
			12. Totally and Permanently Disabled?	<input type="checkbox"/> Yes <input type="checkbox"/> No
13. Can anyone claim you or your spouse on their tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure				

Part II. Marital Status and Household Information

1. As of December 31, 2018, what was your marital/ tax filing status?

- Single
- Married Filing Jointly: If yes, did you get married in 2018? Yes No
If your spouse lives outside US and does not have SSN, please attach an original or a certified copy of his/her passport to apply for ITIN and file a joint tax return.
- Married Filing Separately: Please provide your spouse's full name & SSN. You lived together at any time in 2018? Yes No If so, during the final 6 months? Yes No
- Divorced or Legally Separated: Date of final decree or separate maintenance agreement: _____
- Widowed: Year of spouse's death: _____

2. List names below of **everyone** who lived in your home in 2018 . Also list anyone who lived outside of your home that you supported in 2018.

Name (first, last) (Do not enter your name or spouse's name below.) (a)	Date of Birth (mm/dd/yy) (b)	Relationship to you (e.g. daughter, son, mother, sister, none) (c)	Number of months lived in your home (d)	US Citizen or resident of US, Canada or Mexico (yes/no) (e)	Marital Status S = Single M = Married (f)	Full-time Student (yes/no) (g)	Disabled (yes/no) (h)
1.							
2.							
3.							
4.							
5.							
6.							

Part III - Health Care Coverage - Last year, did you, your spouse, or dependent(s)

Yes No Unsure

- 1. Have health care coverage for FULL year 2018? If no, list all months you were NOT covered by a health insurance.
- 2. Receive one or more of these forms from your employer or State? (Check the box) Form 1095-B Form 1095-C
- 3. Have coverage through the Marketplace or State Health Benefit Exchange? (If yes, provide Form 1095-A)
- 4. Have an exemption granted by the Marketplace?

Section A. Please complete – check Yes, No or Unsure to all questions below. Please ask if you need help.

Part IV. Income - Last year, did you or your spouse receive:

Yes No Unsure

1. Wages or Salary? (Form W-2) If yes, how many jobs did you have in 2018? _____
2. Tip Income?
3. Scholarships? (Forms W-2, 1098-T-Tuition Statement)
4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
5. Refund of state/local income taxes? (Form 1099-G)
6. Alimony Income or separate maintenance payments?
7. Self-Employment Income? (Provide business name, address & EIN (if any) & Form 1099-MISC/ Form 1099-K)
8. Cash/check payments for any work performed not reported on Forms W-2 or 1099?
9. Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B)
10. Disability Income (such as payments from insurance, or workers compensation)? (Forms 1099-R, W-2)
11. Retirement Income or distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)
12. Unemployment Compensation? (Form 1099-G)
13. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
14. Income (or loss) from Rental Property?
15. Other Income: (gambling, lottery, prizes, awards, jury duty, etc.)? (Forms W-2 G, 1099-MISC, Sch K-1) Specify: _____

Part V. Expenses – Last year, did you or your spouse pay:

Yes No Unsure

1. Alimony: If yes, do you have the recipient's SSN? Yes No
2. Contributions to a retirement account? IRA Roth IRA 401K Other _____
3. Educational expenses for yourself, spouse or dependents, such as tuitions, books, fees, etc.? (Form 1098-T)
4. Causality/ theft/ loss which was not covered by insurance?
5. Medical & dental expenses (including health insurance premiums)?
6. Home mortgage interest & real estate taxes? (Form 1098/ Letter from County Treasurer)
7. Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)
8. Charitable contributions/donations to church or non-profit organizations?
9. Child or dependent care expenses? (Include daycare/private school/person name, address, EIN/ SSN & amount)

Part VI. Life Events – Last year, did you or your spouse:

Yes No Unsure

1. Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in Box 12)
2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Forms 1099-C, 1099A)
3. Buy, sell or have a foreclosure of your home? (Form 1099-A)
4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? _____
5. Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)
6. Live in an area that was affected by a natural disaster? If yes, where? _____
7. Receive the First Time Homebuyers Credit in 2008?
8. Pay any student loan interest? (Form 1098-E)
9. Make estimated tax payments to 2018 tax? If so how much? _____
10. Attend college as a full-time student? (Form 1098-T)
11. Adopt a child?
12. Check here if you received IRS Notice CP01A containing your Identity Protection PIN due to identity theft

Would you like your **REFUND** deposited into your bank account? Yes No

Bank Name _____ State Opened _____ Checking Saving

Routing# _____ Account # _____

If you have a **BALANCE DUE**, would you like to make a payment directly deducted from your bank account? Yes No