

Was everyone in your household enrolled in a health insurance program for the whole year? YES NO

Did you pay Real Estate Taxes last year? YES NO

Did you pay any amounts to an Ex-Spouse for alimony AND/OR maintenance? YES NO

If yes then enter your Former Spouse's Name & SSN _____

Did you pay any Child Care Expenses (Nanny, Pre-school, before/after care) YES NO If yes, how much? _____

Name _____ Provider EIN#or SSN# _____

Provider's Address _____

Did you make any of the following Energy Improvements to your MAIN home in last year? YES NO

QUALIFIED Solar Electric Systems, Solar Water Heaters, Fuel Cell Property, Small Wind Energy Property, or Geothermal Heat Pumps ONLY

Did you make previous Energy Improvements to your main home AND received a Credit on previous year taxes? YES NO

Will you be filing more than 1 State Return? YES NO

If yes, which States? _____

Will you be claiming any educational expenses? YES NO (College Tuition/Trade School/ Masters Program) (You must have a 1098-T)

Will you be claiming any interest paid on student loans? YES NO (You must have a 1098-E)

(Indiana Residents only)

Did you pay rent? YES NO If yes, how many months did you pay rent? _____

How much was your monthly rent? \$ _____

Landlord's Name _____

Landlord's Address _____

Any Personal Property Taxes? (Ex. Excise tax on license plates) YES NO

Any unearned income? (Ex. Dividends from stocks, Bank Interest from savings) YES NO

Did you have Medical, Dental, or Vision expenses in excess on 7.5% of your income? YES NO

Did you make any cash contributions or non-cash donations to charities? YES NO

Did you contribute to an IRA (Individual Retirement Account) in 2017 or will you before 4/17/2018? YES NO

If yes, was it a Roth IRA or a Traditional IRA? _____

Did you have any 1099-R Retirement Distributions? YES NO

Did you have any self-employment income? YES NO

Did you sell any stocks or bonds? YES NO

Did you have any rental property income? YES NO

Did you have any Social Security income? YES NO

Are there any years that you did not file your taxes? YES NO

If Yes, what years haven't been filed? _____

Did you make Quarterly Estimated Federal or State tax payments? YES NO

Did you buy a vehicle, building materials, boat or make any other LARGE purchase incurring a LARGE amount of sales tax? YES NO

Cornerstone Tax Service, Inc. (Accountant) will prepare our personal or corporate income tax returns based on information we will present to the accountant. Cornerstone Tax Service, Inc. will perform due diligence but will not audit or otherwise verify the data we submit.

The accountant may ask us for clarification of some of the information, or for additional information. It is the accountants responsibility to prepare our tax return correctly according to the law and the information that we have provided.

It is our responsibility to provide the accountant with all the information required to prepare complete and accurate returns.

Our tax return cannot be filed until all forms are signed and returned to the office.

I declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.

Taxpayer Signature _____ Date _____