Trinity Global Financial Group 267 John Knox Road Suite 212 Tallahassee, FL 32303 850-877-9461 Office 850-792-2785 Fax

2018 Personal Data

Send 1985 If not, please complete the ACA page. Did you have health ins for 12 months? Send 1985 If not, please complete the ACA page. Address to use on tax return Apt City State Zip On 1887 Send 1985 If not, please complete the ACA page. Address to use on tax return No. ROTE: If the address ABOVE does NOT infect your saids date of missions liquid a family/flend's nailing address) we MUST have your state of residence to proverly file your intern. Send Act on the page of the Province of the Province Send a copy of your current US licenses. Alternatively you can provide the faite, number issue a explaint on dates on the notes page (13). Internatively you can provide the faite, number issue a explaint on dates on the notes page (13). Internatively you can provide the faite, number issue a explaint on dates on the notes page (13). Internatively you can provide the faite, number issue a explaint on dates on the notes page (13). Internatively you can provide the faite, number issue a explaint on dates on the notes page (13). Taxpayer Spouse Date of Birth Daylime Phone Ext Evening Phone Ext Evening Phone Ext Use Province Country? Credentiated? If YES, are you receiving a housing allowance? Form 4361 Exempt from \$S85E tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Did you purchase health care insurance for yourself, or any family memberdependent through a state or federal marketylace/exchange? Form 4361 Exempt from \$S85E tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Did you purchase health care insurance for yourself, or any family memberdependent through a state or federal marketylace/exchange? Full Time Student Blind Do you have a financi	Filing Status:			LIVE IN A FEDERALLY ED DISASTER AREA IN			
Address to use on tax return No. City State Zip No. No. State Zip No. No. State Zip No. No. State St	Taxpayer Name	SSN			-		Send 1095
IN TEXT. The actions ADVE does NOT reflect you actual sets of residence issuins a family filtered it makes the poor state of residence to properly file your nature. Enter ACTUAL STATE OF RESIDENCE (if different): 100 YOU NEED A CITYLOCAL TAX RETURN EXTENSION FILED? SEE NOTE BELOW ABOUT EXTENSIONS. As part of the ID theft protection process states are requiring a different Selense number on the return. Please send a copy of your current US litensees. Alternatively you can provide the States, number, issue & expiration dates on the notes page (13). 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 1 have SENT COPIES or I have ENTERED DATA on page 13. 2 have required the company of the	Spouse Name	SSN					Send 1095
Enter ACTUAL STATE OF RESIDENCE (if different): As part of the ID their protection process states are requiring a driver's Elicense number on the return. Please send a copy of your current US (ilcenses). Alternatively you can provide the state number, issue & expiration dates on the notes age (13). ONLY If your address for the lax return is a foreign country provide foreign: State/Province Country Postal Code MAKE NO ENTRY IF ADDRESS ON RETURN IS IN US. Taxpayer Spouse Taxpayer Spouse Taxpayer Spouse Date of Birth Occupation Occupation Occupation Occupation Occupation Daylime Phone Ext Evening Phone Ext Evening Phone E-mail US Citizen? YES If not, what country? Us Critzen? YES If not, what country? Credentialed? If YES, are you receiving a housing allowance? Form 4361 Exempt from SSSE tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Did you purchase health care insurance for yourself, or any family member/dependent through a state or federal marketplace/exchange? YES If yes, please forward all forms 1995A, B and/or C Did you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, furst, or other type of foreign financial account where the combined place to your return has been effiled. Note that the for the 2019 school year FAFSA data is from your 2017 refign financial account, including a bank account, brokerage account, mutual fund, furst, or other type of foreign financial account where the combined financial account where the combined financial account, including a bank account, brokerage account, work and interest in or signature authority over a foreign financial account, including a bank account, brokerage account, work and interest in or signature authority over a foreign financial account, including a bank account, brokerage account, work and interest in or signature authority over a foreign financial account where the combi		•	City	1	State	Zip	
As part of the ID theft protection process states are aguiring a driver's license number on the return. Please send a copy of your current US licenses. Alternatively you can provide the state, number, issue & expiration dates on the notes page (13). I have SENTED DATA on page (13). ONLY If your address for the tax return is a foreign country provide foreign: Taxpayer Spouse Date of Birth Occupation Daytime Phone Ext Evening Phone Ext Evening Phone Ext Evening Phone E-mail US Citizen? YES If not, what country? US Citizen? YES If not, what country? US Citizen? YES If not, what country? Credentialed? If YES, are your receiving a housing allowance? Form 4361 Exempt from SS/SE tax on file with RS? Full Time Student Blind Did you purchase health care insurance for yourself, or any family member/dependent through a state or federal marketplace/exchange? YES If yes, please forward all forms 1995A, B and/or C Do you look a flancal interest in or signature authority over a foreign flancial account, including a bank account your records. DID you have a flancial interest in or signature authority over a foreign flancial account, including a bank accounts is 10,000 or more? Yes MISTED AND AND AND AND AND AND AND AND AND AN							
licenses. Alternatively you can provide the late, number, issue & expiration dates on the notes page (13). I have SERTOCPIES or I have ENTERED DATA on page 13. ONLY If your address for the tax return is a foreign country provide foreign: Taxpayer Date of Birth Date of Birth Occupation Daytime Phone Ext Daytime Phone Ext Evening Phone Ext Evening Phone E-mail US Citizen? YES If not, what country? Credentialed? If YES, are you receiving a housing allowance? Form 4361 Exempt from SS/SE tax on file with IRS? Full Time Student Billind Did you want \$3 to go to the Presidential Election Campaign Fund Did you need information helpful in completing the FASA application? We will send your FASA data once your return has been effect. Did you need information helpful in completing the FASA application? We will send your FASA data once your return has been effect. Did you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$1,000 or more? You May Late and Extension for your want was not payed to the residential extension from the last own payed as a propiet and returns to refer and extension if you contact use of the payed that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this indronation in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You will send your payed the payed to your payed to your pay. If you are including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You will you have an automatic extension of flow	Enter ACTUAL STATE OF RESIDENCE (if diffe	rent): DO YOU	NEED A C	CITY/LOCAL TAX RETU	RN EXTENSION FILED? SEE NO	OTE BELOW ABOUT I	EXTENSIONS.
ONLY If your address for the tax return is a foreign country provide foreign: Taxpayer Date of Birth Occupation Occupation Daytime Phone Ext Daytime Phone Ext Evening Phone Ext Evening Phone E-mail US Citizen? YES If not, what country? Credentialed? If YES, are you receiving a housing allowance? Form 4361 Exempt from SS/SE tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Did you purchase health care insurance for yourself, or any family member/dependent through a state or federal marketplace/exchange? YES If yes, please forward all forms 1995A, B and/or C Do you need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been effect. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts to file with 1878. PAFIL 1878, you have an automatic extension for limit in the specific payments and the specific payments are due on April 15° of each year. If you are living outside the United States ON APRIL 1871, you have an automatic extension for limit in the specific payments are due on April 15° do each year. If you are living outside the United States ON APRIL 1871, you have an automatic extension for flum unsertial payments are due on April 15° do each year. If you are living outside the United States ON APRIL 1871, you have an automatic extension for limit in the extension if you contact us or I'we have received your Extension and a provide payments or your setum be textension if you contact us or I'we have received your Extension and the payments and or your setum to the state tox attend to the specific payment your your extension flour contact us or I'we have received your Extension and the required payments and or your setum the dear to your setum the federal extension fundation payments		de the <mark>state, number,</mark>	issue 8	expiration dates	on the notes page (13).	send a copy of yo	our current US
Taxpayer Date of Birth Daytime Phone Ext Evening Phone Ext Evening Phone Ext Evening Phone E-mail E-mail US Citizen? YES If not, what country? Credentialed? If YES, are you receiving a housing allowance? Form 4301 Exempt from \$SISE tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Did you purchase health care insurance for yourself, or any family member/dependent through a state or federal marketplace/exchange? YES If yes, please forward all forms 1095A, B and/or C Do you need information helipful in completing the FAFSA application? We will send your FAFSA data once your return has been effiled. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filing. DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15" of each year. If you are unable to file by the applicable date you MUST apply for an extension to file until June 15" without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension to file until June 15" without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension to file until June 15" without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension to time to the word your state of residence. Please note that most					. 0		
Date of Birth Occupation Occupation Daytime Phone Ext Daytime Phone Ext Evening Phone Ext Evening Phone Ext Cell Phone Foreign Phone E-mail E-mail US Citizen? YES If not, what country? US Citizen? YES If not, what country? US Citizen? YES If not, what country? Credentialed? If YES, are you receiving a housing allowance? Form 4361 Exempt from SS/SE tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Doy ou need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been effied. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all some or will be applicable date you MUST complete and return the bast four pages as appropriate for your situation by MARCH 31, 2018 to ensure limits of the applicable date you MUST apply to ran extension to file until June 15th without any action needed on your part. If you are unable to file by the applicable date you MUST apply to ran extension of the without any action needed on your part. If you are unable to file by the applicable date you MUST apply to ran extension of the will never the state extension of the will never the state extension of the will never the state extension of the proparation of myour 2018 income tax returns to cover your estimated tax liability. If you are living our responsibility, if this popular was questionnaire for the perparation of myour 2018 income tax return is true, correct and complete. We also cer			ovide fo	reign: Sta	te/Province Cou	intry	Postal Code
Occupation Daytime Phone Ext Daytime Phone Ext Evening Phone Ext Evening Phone Ext Cell Phone Foreign Phone Foreign Phone Foreign Phone E-mail US Citizen? YES If not, what country? US Citizen? YES If not, what country? US Citizen? YES If not, what country? Credentialed? If YES, are you receiving a housing allowance? Form 4361 Exempt from SS/SE tax on file with IRS? Full Time Student Blind Form SS/SE tax on file with IRS? Full Time Student Blind For SS/SE tax on file with IRS? Full Time Stude	Taxpayer				Spouse		
Daytime Phone	Date of Birth			Date of Birth			
Evening Phone Ext Evening Phone Email E-mail US Citizen? YES If not, what country? US Citizen? YES If not, what country? US Citizen? YES If not, what country? Credentialed? If YES, are you receiving a housing allowance? Form 4361 Exempt from SS/SE tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Do you need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been efiled. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as a parporate for your situation by NARCH 31, 2018 to ensure themly films? DID EDATES and ESTIMATED PAYMENTS: Federal returns are due on April 15th of each year, it you are living outside the United States QN APRIL 15TH, you have an automatic extension to file until June 15th without any action needed on April 15th you have an automatic extension to file until June 15th without any action needed on April 15th you have and 90% of the state account when your state of residence. Please note that two only apply for an extension we will include the state extension if we know your state of residence. Please note that two only apply for an extension of the preparally follow the federal extension of the prepare live to the preparal following year. Most states require that you make payments to cover your estimated tax liability. If you have an add 90% of the state ax due on the paperation of mylour 2018 income tax return is true, correct a	Occupation			Occupation			
Cell Phone Foreign Phone E-mail US Citizen? YES If not, what country? US Citizen? YES If not, what country? Credentialed? If YES, are you receiving a housing allowance? Form 4361 Exempt from SS/SE tax on file with IRS? Full Time Student Blind Form SS/SE tax on file with IRS? Full Time Student Blind	Daytime Phone	Ext		Daytime Phone	Ext		
E-mail US Citizen? YES If not, what country? US Citizen? YES If not, what country? Credentialed? If YES, are you receiving a housing allowance? Form 4361 Exempt from SS/SE tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Did you purchase health care insurance for yourself, or any family member/dependent through a state or federal marketplace/exchange? YES If yes, please forward all forms 1095A, B and/or C Do you need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been effled. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, is prokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filing. DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15th you are living outside the United States ON APRIL 15th, you have an automatic extension to file until June 15th without any action needed on your part. If you are naveled to complete the return by the due date. State returns are due on April 15th apply for an extension! We will be complete the return by the due date. State returns are due on April 15th and generally follow the federal extension dates however some states do not. When you ask us to apply for an extension if you have paid 90% of the state extension if we know your state of residence. Please note that most states will only grant the extension if you have paid 90% of the state text due on the return by use paid 15th you have an advancance of the state state will be penalized. We will be	Evening Phone	Ext		Evening Phone	Ext		
E-mail US Citizen? YES If not, what country? US Citizen? YES If not, what country? Credentialed? If YES, are you receiving a housing allowance? Form 4361 Exempt from SS/SE tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Did you purchase health care insurance for yourself, or any family member/dependent through a state or federal marketplace/exchange? YES If yes, please forward all forms 1095A, B and/or C Do you need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been effied. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely films. DID DED ATES and ESTIMATED PAYMENTS: Federal returns are due on April 15" of ach year. If you are living outside the United States QN APRIL 15TH, you have an automatic extension to file until June 15th without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension. Please note that we only apply for an extension if you contact us or if we have received your tax questionaries and are not able to complete the return by the due date. State returns are due on April 15th applicable due to the proper of the proper of the return by the original due date of April 15th. Estimated payments are due on the 15th day of April, June, September and January the following year. Most states require that you make payments to cover your estimated that liability. If you have not make payments and flee after the due date, even if you have applied for an ext		ne		Cell Phone	Foreign Ph	one	
Credentialed? If YES, are you receiving a housing allowance? Form 4361 Exempt from SS/SE tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Did you purchase health care insurance for yourself, or any family member/dependent through a state or federal marketplace/exchange? YES If yes, please forward all forms 1095A, B and/or C Do you need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been effled. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, frust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filing. DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15th of each year. If you are living outside the United States ON APRIL 15TH, you have an automatic extension to file until June 15th without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension. Please note that we only apply for an extension in you contact us or if we have received your tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15th and generally follow the federal extension dates however some states do not. When you ask us to apply for an extension in you contact us or if we have received your tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15th and generally follow the federal extension				E-mail	5		
Form 4361 Exempt from SS/SE tax on file with IRS? Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Did you purchase health care insurance for yourself, or any family member/dependent through a state or federal marketplace/exchange? YES If yes, please forward all forms 1095A, B and/or C Do you need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been efiled. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filing. DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15th of each year. If you are living outside the United States ON APRIL 15TH, you have an automatic extension of lie until June 15th without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension in you contact us or if we have received your tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15th and generally follow the federal extension dates however some states do not. When you ask us to apply for an extension we will include the state extension if we know your state of residence. Please note that most states will only grant the extension if you have applancy the following year. Most states require that you make payments to cover your estimated tax liability. If you have not made the required payments and fle after	US Citizen? YES If not, what coun	try?		US Citizen? YES	If not, what country?		
Full Time Student Blind Do you want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Does spouse want \$3 to go to the Presidential Election Campaign Fund Did you purchase health care insurance for yourself, or any family member/dependent through a state or federal marketplace/exchange? YES If yes, please forward all forms 1095A, B and/or C Do you need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been efiled. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filing. DIE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15th of each year. If you are living outside the United States ON APRIL 15TH, you have an automatic extension to file until June 15th without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension. Please note that we only apply for an extension if you contact us or if we have received your tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15th out ontact us or if we have received your tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15th out ontact us or if we have received your accounts and the preparent of the great and are not able to complete the return by the due date. If you have not made the required payments in the wind your day paying the preparent of the your paying the preparent of the your will inc			_			ŭ	~
Did you purchase health care insurance for yourself, or any family member/dependent through a state or federal marketplace/exchange? YES If yes, please forward all forms 1095A, B and/or C Do you need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been efiled. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filing. DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15th of each year. If you are living outside the United States ON APRIL 15TH, you have an automatic extension to file until June 15th without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension if you contact us or if we have received your tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15th and generally follow the federal extension dates however some states do not. When you ask us to apply for an extension we will include the state extension if we know your state of residence. Please note that most states will only grant the extension if you have paid 90% of the state tax due on the return by the original due date of April 15th. Estimated payments are due on the 15th day of April, June, September and January the following year. Most states require that you make payments to cover your estimated tax liability. If you have not made the required payments and file after the due date, even if you have applied for an extension of time to file, you will usually be penalized. We will be glad to pr	,	ir inc with inco.	1			with IRS?	
Do you need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been efiled. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filling. DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15th of each year. If you are living outside the United States ON APRIL 15TH, you have an automatic extension to file until June 15th without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension. Please note that we only apply for an extension if you contact us or if we have received your tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15th and generally follow the federal extension dates however some states do not. When you ask us to apply for an extension we will include the state extension if we know your state of residence. Please note that most states will only grant the extension if you have paid 90% of the state tax due on the return by the original due date of April 15th. Estimated payments are due on the 15th day of April, June, September and January the following year. Most states require that you make payments to cover your estimated tax liability. If you have not made the required payments and file after the due date, even if you have applied for an extension of time to file, you will usually be penalized. We will be glad to provide you with help calculating estimated payments and provide payment vouchers upon request. I/We do hereby declare that, to the best o	Do you want \$3 to go to the Presidentia	al Election Campaign F	und '	Does spouse wa	nt \$3 to go to the Presidenti	al Election Campa	ign Fund
Do you need information helpful in completing the FAFSA application? We will send your FAFSA data once your return has been efiled. Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filling. DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15th of each year. If you are living outside the United States ON APRIL 15TH, you have an automatic extension to file until June 15th without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension. Please note that we only apply for an extension if you contact us or if we have received your tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15th and generally follow the federal extension dates however some states do not. When you ask us to apply for an extension we will include the state extension if we know your state of residence. Please note that most states will only grant the extension if you have paid 90% of the state tax due on the return by the original due date of April 15th. Estimated payments are due on the 15th day of April, June, September and January the following year. Most states require that you make payments to cover your estimated tax liability. If you have not made the required payments and file after the due date, even if you have applied for an extension of time to file, you will usually be penalized. We will be glad to provide you with help calculating estimated payments and provide payment vouchers upon request. I/We do hereby declare that, to the best o	Did you purchase health care insura	nce for yourself, or a	ny fami	<u> </u> y member/depend	ent through a state or fed	eral marketplace/	exchange?
Note that the for the 2019 school year FAFSA data is from your 2017 return so you may already have this information in your records. DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filling. DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15th of each year. If you are living outside the United States ON APRIL 15TH, you have an automatic extension to file until June 15th without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension. Please note that we only apply for an extension if you contact us or if we have received your tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15th and generally follow the federal extension dates however some states do not. When you ask us to apply for an extension we will include the state extension if we know your state of residence. Please note that most states will only grant the extension if you have paid 90% of the state tax due on the return by the original due date of April 15th. Estimated payments are due on the 15th day of April, June, September and January the following year. Most states require that you make payments to cover your estimated tax liability. If you have not made the required payments and file after the due date, even if you have applied for an extension of time to file, you will usually be penalized. We will be glad to provide you with help calculating estimated payments and provide payment vouchers upon request. I/We do hereby declare that, to the best of my knowledge and belief, the information furnished by me/us in this questionnaire for the preparation of my/our 2018 income tax ret	YES If yes, please forward all for	ms 1095A, B and/or 0	;				
DID you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filing. DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15 th of each year. If you are living outside the United States ON APRIL 15TH, you have an automatic extension to file until June 15 th without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension. Please note that we only apply for an extension if you contact us or if we have received you tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15 th and generally follow the federal extension dates however some states do not. When you ask us to apply for an extension we will include the state extension if we know your state of residence. Please note that most states will only grant the extension if you have paid 90% of the state tax due on the return by the original due date of April 15 th . Estimated payments are due on the 15 th day of April, June, September and January the following year. Most states require that you make payments to cover your estimated tax liability. If you have not made the required payments and file after the due date, even if you have applied for an extension of time to file, you will usually be penalized. We will be glad to provide you with help calculating estimated payments and provide payment vouchers upon request. I/We do hereby declare that, to the best of my knowledge and belief, the information furnished by me/us in this questionnaire for the preparation of my/our 2018 income tax return is true, correct and complete. I/We also certify that I/We will analyze the prepared return to verify the correctness of i	Do you need information helpful in co	ompleting the FAFSA	applica	ation? We will sen	d your FAFSA data once y	our return has b	een efiled.
mutual fund, trust, or other type of foreign financial account where the combined highest balance of all accounts is \$10,000 or more? You MUST complete and return the last four pages as appropriate for your situation by MARCH 31, 2018 to ensure timely filing. DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15 th of each year. If you are living outside the United States ON APRIL 15TH, you have an automatic extension to file until June 15 th without any action needed on your part. If you are unable to file by the applicable date you MUST apply for an extension. Please note that we only apply for an extension if you contact us or if we have received your tax questionnaire and are not able to complete the return by the due date. State returns are due on April 15 th and generally follow the federal extension dates however some states do not. When you ask us to apply for an extension we will include the state extension if we know your state of residence. Please note that most states will only grant the extension if you have paid 90% of the state tax due on the return by the original due date of April 15 th . Estimated payments are due on the 15 th day of April, June, September and January the following year. Most states require that you make payments to cover your estimated tax liability. If you have not made the required payments and file after the due date, even if you have applied for an extension of time to file, you will usually be penalized. We will be glad to provide you with help calculating estimated payments and provide payment vouchers upon request. I/We do hereby declare that, to the best of my knowledge and belief, the information furnished by me/us in this questionnaire for the preparation of my/our 2018 income tax return is true, correct and complete. I/We also certify that I/We will analyze the prepared return to verify the correctness of information compiled by the preparer. I/We realize that the accuracy of the return is my/our responsibility. If this document is submitted b	Note that the for the 2019 school year	r FAFSA data is from	your 20	017 return so you	may already have this info	ormation in your	records.
DUE DATES and ESTIMATED PAYMENTS: Federal returns are due on April 15 th of each year. If you are living <u>outside</u> the United States <u>ON APRIL 15TH</u> , you have an automatic extension to file until June 15 th without any action needed on your part. If you are unable to file by the applicable date you <u>MUST</u> apply for an extension. Please note that <u>we only apply for an extension if you contact us or if we have received your tax questionnaire and are not able to complete the return by the <u>due date</u>. State returns are due on April 15th and generally follow the federal extension dates however some states do not. When you ask us to apply for an extension we will include the state extension if we know your state of residence. Please note that most states will only grant the extension if you have paid 90% of the state tax due on the return by the original due date of April 15th. Estimated payments are due on the 15th day of April, June, September and January the following year. Most states require that you make payments to cover your estimated tax liability. If you have not made the required payments and file after the due date, even if you have applied for an extension of time to file, you will usually be penalized. We will be glad to provide you with help calculating estimated payments and provide payment vouchers upon request. I/We do hereby declare that, to the best of my knowledge and belief, the information furnished by me/us in this questionnaire for the preparation of my/our 2018 income tax return is true, correct and complete. I/We also certify that I/We will analyze the prepared return to verify the correctness of information compiled by the preparer. I/We realize that the accuracy of the return is my/our responsibility. If this document is submitted by email or via your SecureFile Pro portal, the email/upload will serve as electronic signature.</u>	mutual fund, trust, or other type of fo	reign financial accou	int wher	e the combined hi	ghest balance of all accou	nts is \$10,000 or	more?
preparation of my/our 2018 income tax return is true, correct and complete. I/We also certify that I/We will analyze the prepared return to verify the correctness of information compiled by the preparer. I/We realize that the accuracy of the return is my/our responsibility. If this document is submitted by email or via your SecureFile Pro portal, the email/upload will serve as electronic signature.	DUE DATES and ESTIMATED PAYMING APRIL 15TH, you have an automatic applicable date you MUST apply for your tax questionnaire and are not a federal extension dates however son know your state of residence. Pleas return by the original due date of Apyear. Most states require that you mafter the due date, even if you have a help calculating estimated payments	ENTS: Federal return extension to file untian extension. Please ble to complete the rene states do not. When enote that most stateril 15th. Estimated paake payments to coupplied for an extension and provide payments.	ns are di I June 1 e note the eturn by en you es will d nyments ver your ion of til nt vouch	ue on April 15 th of 5 th without any act at we only apply for the due date. Sta ask us to apply for only grant the externate due on the 15 estimated tax liabme to file, you will ners upon request.	each year. If you are living tion needed on your part. or an extension if you conte returns are due on Aprir an extension we will inclusion if you have paid 90% day of April, June, Septe ility. If you have not madusually be penalized. We	g <u>outside</u> the Unit If you are unable tact us or if we ha I 15 th and general ude the state exte of the state tax of the state tax of the required par will be glad to pr	ted States ON to file by the ave received lly follow the ension if we due on the ry the following yments and file ovide you with
Taxpayer Signature Date Spouse Signature Date	preparation of my/our 2018 income to verify the correctness of information	tax return is true, con a compiled by the pre	rrect an eparer. I	d complete. I/We a /We realize that th	ilso certify that I/We will a e accuracy of the return is	nalyze the prepar s my/our respons	red return to
	Taxpayer Signature		Date	Spouse	e Signature		Date

Taxpayer Name:				SSN:
*** SEE NOTES AT BOTTOM**	**	Depen	dents	*** SEE NOTES AT BOTTOM***
First Name	Initial	Last Name		Suffix
SSN	Relationship			Number of months lived with you in 2018
Date of Birth		ndent have income o ce for 12 months?		want RLE to prepare a return for this income?*
Child care expenses incurred and paid	d in2017 **			
First Name	Initial	Last Name		Suffix
SSN	Relationship			Number of months lived with you in 2018
Date of Birth	Health Insurance	ndent have income o		want RLE to prepare a return for this income?* lete the ACA pages. Send 1095 A, B or C
Child care expenses incurred and paid	I in 2018 **			
First Name	Initial	Last Name		Suffix
SSN	Relationship			Number of months lived with you in 2018
Date of Birth		ndent have income o		want RLE to prepare a return for this income?* blete the ACA pages. Send 1095 A, B or C
Child care expenses incurred and paid	l in 2018 **			
First Name	Initial	Last Name		Suffix
SSN	Relationship			Number of months lived with you in 2018
Date of Birth	Health Insurance	ndent have income o		want RLE to prepare a return for this income?* blete the ACA pages. Send 1095 A, B or C
Child care expenses incurred and paid i	in 2018 **			
First Name	Initial	Last Name		Suffix
SSN	Relationship			Number of months lived with you in 2018
Date of Birth		ndent have income o ce for 12 months?		want RLE to prepare a return for this income?* plete the ACA pages. Send 1095 A, B or C
Child care expenses incurred and paid	in 2018 **			
* If you choose to have RLE prepare	your dependent	t's return please for	ward a copy of their \	N-2 and/or 1099 documents. If NOT, be sure the

NOTE: If you qualified for Earned Income Credit in 2017 please provide documentation to prove the child's residence during 2018. include medical records, school records, day care records, etc.

dependent does NOT claim themselves as an exemption on their return.

^{**} Provide the name, address and EIN or SSN for child care provider. Use last page for notes if needed.

Taxpayer Name:	SSN:

ESTIMATED TAX PAID	Amount Paid To IRS	Date Paid	Amount Paid To State	Date Paid	Amount Paid To Local	Date Paid
2016 overpayment applied to 2018 taxes						
1st Qtr 2018 payment (was due 4/15/2018)						
2 nd Qtr 2018 payment (was due 6/15/2018)						
3rd Qtr 2018 payment (was due 9/15/2018)						
4th Qtr 2018 payment (was due 1/15/2019)						
Total						

The quarterly payments for HQ will appear on your April, June, September 2018 and January 2019 statements as a transaction in your class (05) shown as CK UNITED STATES TREASURY 05. Be sure to forward your statements to us for verification. We will ALSO NEED YOUR DECEMBER 2018 STATEMENT! **PDF FORMAT IS PREFERRED**

IF YOU ARE DUE A REFUND INDICATE HOW IT SHOULD BE HANDLED

Apply overpayment to your 2019 estimated taxes

Direct deposit to your checking/savings account (enclose a voided check)

Paper check in the mail to the address on your return

We can process a credit card payment for our fee when your return is prepared and filed. The authorization form is found in the public folder of your portal and can be downloaded, completed and returned once we have sent the processed return for your review. The processed return will include our invoice so that you can properly complete the authorization form before returning it through your SecureFile Pro portal. DO NOT EMAIL THAT COMPLETED FORM.



Protection Plus is the leading provider of audit assistance and identity theft restoration services in the tax industry. For a one-time fee of \$56.95 at the time of tax preparation, their experienced professionals will provide assistance with a multitude of IRS issues and provide identity restoration services in the event your identity is compromised. The audit assistance will provide coverage on your 2018 federal tax return for three years, and the identity theft restoration services for a full year. We are recommending that all of our clients add this valuable service to their tax preparation this year.

Mark this box to authorize the inclusion of this invaluable service with your return preparation. Note that you will have opportunity to reconsider before the fee is applied to your return.

Taxpayer Name:					SS	N·	
raxpayer Hame.	-					14.	
			ome				
	PLEASE ENCLOS	SE ALL	FORMS 1099 A	AND W-2	2		
EMPLOYER	JOB TITLE		Тахра		ROSS E	ARNINGS	Spouse
			-				
W2 & 1099 attached YES □ NO □	If no, please provide expla	nation o	n comments page o	of questio	nnaire.		
SOCIAL SECURITY BEN	FEITS						
1099SSA attached YES \(\text{NO} \)	LFITS		Taxpayer				Spouse
Net benefits (1099SSA Box 5) MEDICARE Premiums (1099SSA B	ov 2 Bort P. C2D)						
Income tax withheld (1099SSA Box							
IRA/MBA DISTRIBUTION	IS 4000D -#k1 V- 5	1 N	Wee	- المعالمة	ou2 1/-		
PAYER'S NAM			Was any portion KPAYER AMOUNT	rolled ov	er? Yes		SE AMOUNT
1711 211 0 107 111							
INTEREST INCOME Interes	est earned on accounts held in PAYER'S NA		anks must be report	ed 1099	INT atta	ched Yes	□ No □ AMOUNT
	TATERORA	-1VIL					AWOON
DIVIDEND INCOME 1099E	DIV attached Yes □ No □						
PAYER'S N		Ordi	nary Dividends	Qual	ified Div	idends	Capital Gains Distribution
							Distribution

Taxpayer Name:						SSN:		
RENTAL INCOME & EXP	PENSE 1099M at	tached Yes □ No						
	o roberty & Address	tached les 🗆 No		Dates available for rent		Rented at less than fair rental value?	Rented to a relative?	Did you participate in management of property?
Α						□Yes □No	□Yes □No	☐Yes ☐No
В						□Yes □No	☐Yes ☐No	□Yes □No
C								□Yes □No
D						□Yes □No	□Yes □No	□Yes □No
Е						□Yes □No	□Yes □No	□Yes □No
F						□Yes □No	□Yes □No	□Yes □No
	Property A	Property B	Р	roperty C	Pr	operty D	Property E	Property F
Total Rent Received				. ,		. ,	r · · · y =	.,,
Advertising								
Auto & Travel								
Cleaning & Maintenance								
Insurance								
Legal & Professional Fees								
Management Fees								
Mortgage Interest to Banks O								
Other Interest								
Repairs O								
Supplies								
Taxes								1
Utilities								
Other: (please list detail)								1
Original Cost:								
Date Acquired:								
OIL/GAS ROYALTY INCO	OME & EXPEN	NSE 1099M attach	ned Y	es 🗆 No 🗆				
	Payer Name				A	mount	Taxes Paid	Other
	<u> </u>							Expenses
ROYALTIES, PARTNERS								•
Royalties (Copyrights & Patents) Ple								_
Royalties (Authors, Artists, etc.) <u>Ple</u> Did you own an interest in one or			tach a	II Schedules	K-1			YES□ NO□
Did you receive income from a tru								YES NO

Taxpayer Name:				S	SN:		
DO NOT COMPLETE THE HOCCEDENTIALED AND RE							
		_					
U.S. HOUSING EXPENSES (ACTUAL EXPENSE)	SE) (<u> </u>					
For Home You <u>LIVED IN</u>		₹)		For Home	You <u>LIVE</u>	<u>D IN</u>	
RENTED				C	WNED		
Rent paid			otal mortga roperty tax and i	ge payments (prinnsurance)	ciple, interest,		
Utilities [electricity, gas, water, trash pickup, local telephone service, internet and cable (no cellphones)]		L	own payme	ent made in 2018			
Furnishings, appliances, bedding, utensils, etc.		U te	Itilities [electrelephone service	icity, gas, water, trash p , internet and cable (no o	ckup, local cell phones)]		
Repairs and maintenance (including tools and materials for DIY)			urnishings, itensils, etc	appliances, bed	ding,		
materials for Birty		R		maintenance (inclu	iding tools		
		u	na materialo for	511)		1	
Fair rental value of home you OWNED and lived in					0		
Fair rental value of U.S. housing provided to you free of cha	arge				<u>6</u>		
U.S. Housing allowance declared					6		
					}		
FIELD HOUSING (SHELTER)		1 ^s	t Quarter	2 nd Quarter	3 rd Quar	ter	4 th Quarter
*Do NOT add items here that were not included in your quarterly	y reports.		lget Report	Budget Repor			Budget Report
Rent paid							
Utilities (electricity, gas, water, trash pickup)							
Repairs and maintenance							
Totals							
RESIDENCY INFORMATION (if you were perman	nently based	in the	U.S. for all	of 2018, you may	skip this sec	tion.)	
If you are in the U.S., give date you will be leaving for the fit phone # where you can be reached then.	eld and						
If you are in the field, give date you will return to the U.S. ar phone where you can be reached then.	nd						
Check box if you ever claimed to foreign authorities you are	e not a bona	fide r	esident of c	ountry YES□	NO□		
Check box if you are required to pay income tax in your for				YES NO			
Type of Visa	 		on Date				
				s furnished by En	nlover		
housing Other (please describe)				- Turmonou 27 2	.p.0 y 0.		
Last foreign address during 2018 REQUIRED IF YOU LIVE) <u>!</u>)					
	ity:			Province:			
Country: F	oreign Post	al Co	de:				
Check box if you maintained a home in the U.S. YE	S□	Che	eck box if re	ntal unit 🔲 IFC	HECKED, COMPLE	TE INFO	DRMATION BELOW
Address of home							
Name of Occupants							
Relationship to you							
U.S. ARRIVAL AND DEPARTURE DATES PIGOT 2019. Note that if spouse receives income for work performed about							
2049 EVACT DATES Cheek Dov. if averages All of 2042				040 EVACT OF 1	AITIOIDATES :	DATE:	
2018 EXACT DATES Check Box if overseas ALL of 2018 DEPARTED FOREIGN COUNTRY ARRIVED IN FOREIGN	COLINTRY	DED		2019 EXACT OR A REIGN COUNTRY			REIGN COUNTRY
DEI ARTED I ORLIGIT COURTRI ARRIVED IN FOREIGN	COUNTRI	DEP	AILLD FOR	CLIGIT COUNTRY	AININEDI	14 1 OF	CLIGIT COUNTRY

NOTE THAT WE ARE ASKING FOR YOUR DATES FOR DEPARTURE FROM AND ARRIVAL IN THE FOREIGN COUNTRY IN ORDER TO MORE ACCURATELY CALCULATE YOUR TIME IN THE US SINCE INTERNATIONAL AIRSPACE IS DEEMED TO BE TIME IN THE US.

Taxpayer Name:	SSN:

AFFORDABLE CARE ACT & PREMIUM TAX CREDIT

COMPLETE THIS PAGE ONLY IF YOU DID NOT HAVE INSURANCE FOR THE ENTIRE YEAR

	you were covered through HQ, we can extract this information from your monthly statements. Be sure to forward copies of all 2018									
monthly stateme	<u>red through HQ</u> , w nts.	e can extract this	information from y	our monthly state	ments. Be sure to	forward copies of	all 2018			
•	enarios for qualifyi	•	• •	•	ıs to detail in this	document. If you l	nave questions			
	fic situation, pleas									
	In 2018, did you have health care coverage for you, your spouse, and all qualifying dependents? YES NO 'D'YUgY'dfcj]XY'U'WcdmcZU` the Marketplace to help pay for your monthly health care									
	forms 1095 A, B and/or C. payments? YES NO									
Please provide 1095A (will be sent from insurance company)										
	Did you or any dependent receive a Marketplace-Granted Exemption? YES 🗆 NO 🗅 If YES, provide all Exemption Certificate Numbers on									
	the blank page near the end of this document. List name and Exemption Certificate Number. Are you or any of your dependents claiming any other coverage exemption on your return? YES □ NO □ We will contact you for details.									
Are you or any o	f your dependents ried in 2018? YES	claiming any oth	er coverage exem	otion on your retu	rn? YES □ NO □	We will contact y	ou for details.			
	policy with another		I NO□							
-	yes to either quest			ve calculation? Y	ES NO					
	pendents were no					RE covered and li	st the total			
	amount for taxpay									
10007.1	TAXPAYER	SPOUSE	DEPENDENT 1	DEPENDENT 2	DEPENDENT 3	DEPENDENT 4	DEPENDENT 5			
JANUARY										
FEBRUARY										
MARCH										
APRIL										
MAY										
JUNE										
JULY										
AUGUST										
SEPTEMBER										
OCTOBER										
NOVEMBER										
DECEMBER										
ANNUAL PREMIUM AMOUNT										

The Affordable Care Act of 2010 requires that health care coverage information be reported on the individual tax returns for 2018 There are numerous scenarios that could arise as a result of this requirement. The possibilities are far too complex and extensive to address them all here so we will provide information for the most common scenarios and request that you contact us directly with questions about YOUR situation if it falls outside of these common areas.

- 1. If you and your dependents were insured for all of 2018 simply check the box on the questionnaire for yourself and each of your dependents.
- 2. If you and/or your dependents were not insured for all of 2018 complete the ACA page indicating which months each of you had coverage along with all other required information.
- 3. If you and/or your dependents purchased healthcare through either a state or federal healthcare exchange provide your form 1095A and check the appropriate box on the ACA page.
- 4. If you received advance premium tax credits to assist with paying for your healthcare premiums purchased through the marketplace, you **MUST** file a return in order to reconcile that credit. Additionally, we will need to have the income information for all members of your household who are required to file a tax return. It is strongly suggested that we prepare those household member returns to ensure that the information is processed accurately.

PROFESSIONAL EXPENSES Provide N	IAME of E						
Describe nature of business:		DO NOT LYST EX	PENSES FOR WHICH Y			LL BE REI	MBURSI
ITEMS NORMAĽLY 100% BUSINESS USI DESCRIPTION	AMOUNT	-	ITEMS NEEDIN	G ALLOCA		DUNT	BUS.
Credential and Professional Dues:	AWOUNT	Repairs on profe	essional equipment:	<u></u>	AIVIC	JUNI	Б03.
Supplies for business purposes:		Credit card fees		}	1		
Out of town travel (other than meals):		Internet & e-mai		1			
Meals:		Cell phone char		0			
Periodicals & one-read books (no newspapers):		Computer softw		1			
Reference books for your library:							
Long distance calls for business purposes:					1		
Newsletters:							
Postage for business purposes:							
Gifts for business purposes:							
Professional education:							
Ų							
VEHICLE INFORMATION							
*Do NOT list STL vehicles or vehicles which		on-STL vehicles w				orrowed	
were NOT used for business. (STL vehicles used in the US MAY qualify to be listed here)		r business even tho WM reimbursed yo				actual e	
Needed Data		Vehicle 1	Vehicle 2	Vehic		_	nicle 4
Year and make of vehicle							
Date vehicle FIRST PUT INTO SERVICE FOR BUSINE	CC LICE:						
	.33 USE.						
Purchase price							
Owned, rented, leased, lease-purchase or borrowed							
Was vehicle used on the field?							
Was vehicle used on the field? For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses.	u were						
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses.	u were						
	u were						
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses.	u were						
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018	u were	VES II	VES □	VEQ		V	e П
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018	u were	YES 🗆	YES 🗆	YES		YE	:s □
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018 Do you have written records of the above mileage?	u were	YES 🗆	YES 🗆	YES		YE	:s 🗆
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018 Do you have written records of the above mileage? Vehicle rental or lease payments	u were	YES 🗆	YES 🗆	YES		YE	:S 🗆
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018 Do you have written records of the above mileage? Vehicle rental or lease payments	u were	YES 🗆	YES 🗆	YES		YE	:s □
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018 Do you have written records of the above mileage? Vehicle rental or lease payments Gas, oil, repairs, insurance, washes, etc.	u were	YES 🗆	YES 🗆	YES		YE	ES 🗆
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018 Do you have written records of the above mileage? Vehicle rental or lease payments Gas, oil, repairs, insurance, washes, etc. Total \$ amount of interest paid on vehicle loans	u were	YES 🗆	YES 🗆	YES		YE	≅S □
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018 Do you have written records of the above mileage? Vehicle rental or lease payments Gas, oil, repairs, insurance, washes, etc. Total \$ amount of interest paid on vehicle loans	u were	YES 🗆	YES 🗆	YES		YE	≅S □
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018 Do you have written records of the above mileage? Vehicle rental or lease payments Gas, oil, repairs, insurance, washes, etc. Total \$ amount of interest paid on vehicle loans Property taxes on vehicle	u were	YES 🗆	YES 🗆	YES		YE	es 🗆
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018 Do you have written records of the above mileage? Vehicle rental or lease payments Gas, oil, repairs, insurance, washes, etc. Total \$ amount of interest paid on vehicle loans Property taxes on vehicle Date sold & selling price (if sold)	u were	YES 🗆	YES 🗆	YES		YE	ES 🗆
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018 Do you have written records of the above mileage? Vehicle rental or lease payments Gas, oil, repairs, insurance, washes, etc. Total \$ amount of interest paid on vehicle loans Property taxes on vehicle Date sold & selling price (if sold)	u were	YES 🗆	YES 🗆	YES		YE	ES 🗆
For personally owned on field vehicles, \$ amount yo reimbursed for fuel & other expenses. Business miles driven in 2018 Personal miles driven in 2018 Do you have written records of the above mileage? Vehicle rental or lease payments Gas, oil, repairs, insurance, washes, etc.		YES	YES	YES			

PROFESSIONAL EQUIPMENT

Please list ONLY equipment purchased with personal funds. Note, however, that the monthly funds you receive from HQ for computer equipment are considered personal funds and you should list these equipment purchases.

Most items of equipment used in your business are included in an IRS list with three broad categories:

1) Items requiring a written log to establish the business use %; 2) Items whose business use % may be documented by other methods; 3) Items not "listed" for which the business use % may be established by your conservative estimate.

The first category includes computers and any equipment attached to them -- either wired or wireless. In order to take a deduction for items in this category, you must indicate that you have in your possession a written log of the time you used the computer. There must be a separate log for each computer.

The log need only show the date, the hours/minutes the computer was used and the hours/minutes for business purposes. Equipment attached to the computer is presumed to be used the same % as the computer itself unless you can demonstrate otherwise.

NOTE: The law does allow for a representative sample in place of a complete year-long log. This sample should cover a period of at least one full month. If you have not kept the log, you can start it now and apply the result back to 2018

NOTE: If the item is 100% business use then no log is required.

The second category includes cameras, camcorders, IPods, audio recorders and players, projectors, etc. You need only to be able to testify that you have documents such as phone bills, pictures, videos, tapes, CDs, etc. that would definitely demonstrate the business use % you assign to the item.

A few items in the third group which could arguably belong to group two include assets such as musical instruments, PDAs and GPS units. The logic is that these are so directly linked to your business that the documentation is not needed.

Equipment purchases of \$250 or less are no longer depreciated. They will be expensed fully in the year purchased. This will reduce your record keeping requirements. Please group all similar equipment purchases where the individual purchase price is below \$250 by category based on the business use percent. For example if you purchased six different items where the business use percent was 75% and the total of all six items was \$350 (No single item over \$250) make one entry of \$350 with a business use of 75%.

Please review your asset list from your **2017** return (if you had assets), and list below any changes to last year's assets, including business use % or sale. Also, please list any assets purchased in **2018** along with the business use %.

Taxpayer Name:					SSN:
	PROFE	SSIONA	L EQUIF	PMENT	
For each item please enter the busir	EQUIPI ness use % and an	MENT REC swer wheth	UIRING A L	OG ı have a representa	tive one-month log to back it up.
DESCRIPTION	DATE	COST	BUS. %	If less than 100%, Do you have a log?	HOW DISPOSED OF IF NOT IN USE IF SOLD PROVIDE DATE AND PRICE
		<u> </u>		have a log?	IF SOLD PROVIDE DATE AND PRICE
		1			
		1			
	Ì				
		ļ			
		1			
		1	<u> </u>		
		 			
	<u> </u>	+			
		 			
		†			
		1	1		
					010

Taxpayer Name:			SSN:	
Reserved for future us	e.			AMOUNT
UICHER ERUCATION E	XPFNSFS O			
HIGHER EDUCATION E	XI LITOLO	university or trade school in 2018, yo	nu may be eligible for a c	rodit againet
your tax and even a refund above	e the tax. For each student, pleas	e send us a copy of Form 1098-T fro	m the school. The cost	of course
		each student, on a separate sheet, dergraduate or post-graduate educa		aid for these
		dergraduate or post-graduate educa	ition.	
RESIDENTIAL ENERGY				
		your primary residence in the U.S. d		
		ent to your primary residence in the the contract or invoice for its purcha		
UNREIMBURSED MEDI				AMOUNT
	cal expenses plies (eyeglasses, hearing aids, etc.)		ANIOUNT
Prescriptions	the topoglasses, nearing alds, etc.	,		
Miles driven in 2018 for medical	ourposes			
INSURANCE			TAXPAYER	SPOUSE
Premiums paid for medical insur	ance (other than Medicare or long-	term health care)		
	ually nursing home) health care ins	urance		
Medicare Part B and Part D prem	iums			
TAXES				
	if included in housing on page 6	DO NOT INCLUDE RENTAL PROPE	ERTY TAXES	
Personal property taxes	certain other major purchases du	ring 2018		
		1111g 2010		
	bulman, racidanas nat rantal nuo	perty (even if included on page 6 for h	variation allowance)	1
	an individual (name address and s		lousing allowance)	
	()	,	·	
Points on an original home loan	,	1.1.1		
	nce (please attach closing/settlement to the homeowners insurance) on morte	,		
	ivestment purposes (e.g. loans to			
nterest paid on student loans		Spouse:	Other Dependen	t:
CHARITABLE CONTRIE	UTIONS O			
	<u>></u>	ions (please list each organization & a	mount)	
·			· · · · · · · · · · · · · · · · · · ·	
Miles driven in 2018 for charity	}			
Non-cash contributions to U.S. b	ased charitable organizations. If	over \$500, provide receipts for all no	on-cash donations.	
MISCELLANEOUS			•	
Did you buy a home during 2008	and receive the homebuyer's cre	dit? YES		
Did you buy a home during 2009	2010 or 2011 and receive the hor	nebuyer's credit? YES		1
Child and dependent care expen	ses so you and your spouse coul	d be gainfully employed		
Educator expenses				
•				
Alimony paid:	Social Security number of per	son to whom paid:		

Taxpayer Name:									5	SSN:										
STATE INFOR	RMATION	Please list be	low each	place w	here yo	u live	d in the	United	l states	during	g 2018	_								
Ade	dress	City							Please give exact dates (MM/DD/YY) To (MM/DD/YY)											
		-								TOTT (IVIN	1/00/11)	I O (IVIIVI) DI	11)							
Please re	efer to the list of states	by each item b	elow. If v	ou live	d in one	or m	ore of t	he stat	es, plea	se ans	wer the	e auestio	n.							
USE TAX	Many States imp																			
	outside the State, on which no sales tax was paid (e.g. mail-order goods, books, subscriptions, internet pur										net purch	ases, etc.).								
Please >																				
read and >	Did you have any such purchases? YES□ Total retail value of goods purchased: \$																			
answer. >	What State did you live in when the goods where purchased?																			
	IL, IA, MN These States grant a credit for expenses parents have paid for textbooks, tuition and lab fees for their																			
TUITION &	children in grades K-12 (excluding expenses for classes in religious instruction)										ction).									
TEXTBOOKS	Child's Name Grade Name of School Address of								of Scho	ol	Amoun									
IEXIBOURS																				
	CA, IN, MA, MI, MN	l, MT (age 62 o	over), N.	J, NY, F	RI, WI				d/											
	These States grant credits to some renters based on the amount of rent paid and/or your amount of income. Landlords name and address:																			
RENTERS	Address where you in Number of months re		l n	/lonthly	Rent	1			1	Total I	Rent									
	Minnesota Only	Please send to				VOUL	landlor	d for 20		Totari	Cont									
	New York Only	Monthly rent i				•			Electri	city 🗆	Furni	shings [Board □							
	Wisconsin Only	Did you pay fo						س دی	_iocui!	only 🗆	i uiiii	Jimys L								
OAL IEODAUA	•			laine□	enting :	IES	<u> </u>	1	Town		1	٠.								
CALIFORNIA	Which State applies	-			2				тахр	ayer		ગ	oouse							
and	How many days where you in the States during 2018? Prior to 2018, when were you last a resident of the State?																			
MAINE		Do you own property in the State? YES□								Y	ES□									
	Do you own property	Town o	r			I							T							
	Qualifying property District to Description of						List or bill number (if available					Date	Amount							
CONNECTICUT	, J	which ta was pai		prop	perty = 100 of 511 Hamber (in ac				paid		paid									
	Primary residence																			
	Automobile																			
CAPITAL GAI	NS & LOSSES (S	ale of stocks, bo	nds land	etc.)																
	PROPERTY SOLD (Num				Δ	cquire	he		Sold		Sol	ling								
	EASE ENCLOSE ALL		ares, etc.)		MM DD YY		ММ			Price		Cost								
												1								
INSTALLMEN	T SALES	IF S	ALE WAS	S IN 201	8. PLE <i>A</i>	SE S	END CO	PY OF	CLOS	ING ST	ATEMI	ENT OR C	CONTRACT							
						cquire			Sold				ved in 2018							
	Description of prop	erty sold			MM	DD	YY	MM	DD	YY		ciple	Interest							
									<u> </u>											
SALE OF DER	SONAL RESIDE	NCF																		
	SONAL RESIDE	NCE			Dato	ocido	nco wa	s acaui	rad:											
Date residence sole	d:		statement	e if noce		eside	nce wa	s acqui	red:			0								
Date residence solo Original cost of res	d: sidence (please attach p	urchase closing			ible)	eside	nce was	s acqui	red:			0								
Date residence sold Original cost of res Cost of improveme	d: sidence (please attach p ents to residence (e.g. a	urchase closing			ible)	reside	ence was	s acqui	red:			0								
Date residence sole Original cost of res Cost of improveme Selling Price (pleas	d: sidence (please attach pents to residence (e.g. a e attach copy of closing	urchase closing additions, storm v statement)	windows, o	carpeting	sible) g, etc.)			s acqui	red:			9								
Date residence sole Original cost of res Cost of improveme Selling Price (pleas How many months	d: sidence (please attach p ents to residence (e.g. a	urchase closing additions, storm of statement) se during the 5	windows, o	carpeting	sible) g, etc.)			s acqui	red:			9	YES□							
Date residence sole Original cost of res Cost of improveme Selling Price (pleas How many months Was the house eve	d: sidence (please attach p ents to residence (e.g. a e attach copy of closing did you live in the hou	urchase closing additions, storm of statement) se during the 5	windows, o	carpeting	o the da			s acqui	red:		Taxi	1								
Date residence sold Original cost of res Cost of improveme Selling Price (pleas How many months Was the house eve	d: sidence (please attach p ents to residence (e.g. a e attach copy of closing did you live in the hour used as a rental prop	urchase closing additions, storm of statement) use during the 5 verty?	windows, o	evious to	sible) g, etc.)			s acqui	red:			payer	Spouse							
Original cost of res Cost of improveme Selling Price (pleas How many months Was the house eve IRA'S	d: sidence (please attach pents to residence (e.g. a) e attach copy of closing did you live in the hour used as a rental propertion.	urchase closing additions, storm vistatement) use during the 5 terty?	years pro	evious to	o the da	ate of	sale?					1								
Original cost of res Cost of improveme Selling Price (pleas How many months Was the house eve IRA'S Do you want to con Amount deposited	d: sidence (please attach pents to residence (e.g. a) e attach copy of closing did you live in the hour used as a rental propertion. htribute to an IRA or Si in a traditional IRA for	urchase closing additions, storm statement) use during the 5 perty?	years pro	evious to	o the da	ate of	sale?					payer	Spouse							
Original cost of res Cost of improveme Selling Price (pleas How many months Was the house eve IRA'S Do you want to con Amount deposited Amount deposited	d: sidence (please attach pents to residence (e.g. a) e attach copy of closing did you live in the hour used as a rental propertion.	urchase closing additions, storm statement) use during the 5 perty? EP IRA if it will section (not election)	years pro	evious to	o the da	ate of	sale?					payer	Spouse							

Taxpayer Name: SSN:	
Begin typing below and provide us with any additional information that you feel is relevant to your 2018 tax return.	
NOTE THAT IF YOU DON'T SEND A COPY OF YOUR U.S. DRIVERS' LICENSE YOU MUST PROVIDE THE S ISSUE DATE AND EXPIRATION DATE FOR YOUR LICENSE. THIS IS REQUIRED FOR BOTH PARTIES MARRIED.	
013	

Taxpayer Name: SSN:										
FOREIGN BANK ACCOUNTS										
PLEASE COMPLETE A SEPARATE FORM FOR SPOUSE IF NECESSARY.										
At any time in 2018, did the combined balances of all foreign accounts on which you could sign exceed \$10,000? YES NO If "NO," do not complete the section below. If "YES," you must give the following for EACH account. If more space is needed, please enclose on										
a separate sheet.										
Part I Informatio	n on Financial Account(s) Owned Separ	ately								
Maximum value of account	Maximum account value unknown □									
Type of account	pe of account									
inancial Institution name										
Account # or other designation										
Address Citv	State									
Foreign postal code	State Country									
<u> </u>	,									
Maximum value of account	Maximum account value unknown □									
Type of account										
Financial Institution name Account # or other designation										
Address										
City	State									
Foreign postal code	Country									
Maximum value of account	Maximum account value unknown □									
Type of account										
Financial Institution name										
Account # or other designation										
Address	Chata									
City Foreign postal code	State Country									
Maximum value of account	Maximum account value unknown □									
Type of account	<u> </u>									
Financial Institution name										
Account # or other designation										
Address										
City	State									
Foreign postal code	Country									
Maximum value of account	Maximum account value unknown □									
Type of account										
Financial Institution name										
Account # or other designation										
Address City	State									
Foreign postal code	Country									
Maximum value of account	Maximum account value unknown □									
Type of account	maximum account value unknown									
Financial Institution name										
Account # or other designation										
Address										
City	State									
Foreign postal code	Country									
Maximum value of account	Maximum account value unknown □									
Type of account										
Financial Institution name										
Account # or other designation										
Address										
City	State									
Foreign postal code	Country									

Part II Information		SSN:								
Part II Information on Financial Account(s) Owned Jointly (PERSONAL ACCOUNTS AND ANOTHER PERSON/ENTITY'S ACCOUNTS)										
Maximum value of account		Maximum account value unknown □								
Type of account		maximum account value amatem								
Financial Institution name										
Account # or other designation										
Address										
City		State								
oreign postal code		Country								
Number of joint owners										
Principal Joint Owner Information										
Taxpayer Identification Number (TIN type (SSN, Foreign, etc.)								
ast name or Organization name										
First name Middle name		Suffix								
Address	\dashv	Suinx								
City	\dashv	State								
Zip/Postal code	\dashv	Country								
Maximum value of account		Maximum account value unknown □								
Type of account	<u> </u>									
Financial Institution name										
Account # or other designation Address										
City		State								
Foreign postal code		Country								
Number of joint owners		Country								
Principal Joint Owner Info	rmatio	 on								
Taxpayer Identification Number (TIN type (SSN, Foreign, etc.)								
Last name or Organization name		ojpo (con, romo.g., con,								
First name										
Middle name		Suffix								
Address										
City		State								
Zip/Postal code		Country								
Maximum value of account		Maximum account value unknown □								
Type of account		•								
	1									
Financial Institution name Account # or other designation										
Account # or other designation Address		11								
Account # or other designation Address City		State	_							
Account # or other designation Address City Foreign postal code		State Country								
Account # or other designation Address City Foreign postal code Number of joint owners	matic	Country								
Account # or other designation Address City Foreign postal code Number of joint owners Principal Joint Owner Info		Country								
Account # or other designation Address City Foreign postal code Number of joint owners Principal Joint Owner Info Taxpayer Identification Number (TIN)	Country								
Account # or other designation Address City Foreign postal code Number of joint owners Principal Joint Owner Info Taxpayer Identification Number (Last name or Organization name	TIN)	Country								
Account # or other designation Address City Foreign postal code Number of joint owners Principal Joint Owner Info Taxpayer Identification Number (Last name or Organization name First name	TIN)	Country								
Account # or other designation Address City Foreign postal code Number of joint owners Principal Joint Owner Infor Taxpayer Identification Number (Last name or Organization name First name Middle name Address	TIN)	TIN type (SSN, Foreign, etc.)								
Account # or other designation Address City Foreign postal code Number of joint owners Principal Joint Owner Info Taxpayer Identification Number (Last name or Organization name First name Middle name	TIN)	TIN type (SSN, Foreign, etc.)								

on Financial Account(s) Where Filer has Signature but NO Financial Interest in the Account(s)								
but NO Financial Interest in the Account(s)								
Maximum account value unknown □								
State								
Foreign postal code Country Owner Information								
TIN 6 may (CCN) Farrainm ata)								
TIN type (SSN, Foreign, etc.)								
Suffix								
Guilla								
State/Territory/Province								
Country Filer's title with this owner								
Maximum account value unknown □								
Maximum account value unknown								
State								
Country								
TIN type (SSN, Foreign, etc.)								
Suffix								
State/Territory/Province								
Country Filer's title with this owner								
Maximum account value unknown □								
·								
State								
Country								
TIM tyme (CCM Equation atc.)								
TIN type (SSN, Foreign, etc.)								
Suffix								
Guilla								
State/Territory/Province								
Country Filer's title with this owner								

Form **114a**

Department of the Treasury Financial Crimes Enforcement Network (FinCEN)

October 2013

Part I

Record of Authorization to Electronically File FBARs

(See instructions below for completion)

Do not send to FinCEN. Retain this form for your records.

Persons who have an obligation to file a Report of Foreign Bank and Financial Account(s)



Owner last name or entity's legal name				2.	Owner first name		3. Owner M. I.			
4. Spouse last name (if jointly filing FBAR - see instructions			s below)	5.	Spouse first name		6. Spouse M. I.			
filing year en and complete Report of For listed in Part	ding De; that I reign B II to re	we have provided information concerning ecember 31,	isted in Part I II to complete sed on the in inquiries and	I; the e and form d res	d submit to the Financial Cri nation that I/we have provide solve issues relating to this	best of my/our imes Enforcen ed; and that I/ submission. I	knowle nent Net we auth we ack	edge true, correct, twork (FinCEN) a norize the preparer nowledge that,		
7. Owner si	gnature	e (Authorized representative if entity)	8 Date		9 Owner or entity TIN	10 TII				
			/ / MM DD YY	// /			t	ype b □ SSN/ITIN c □ Foreign		
11. Spouse	11. Spouse signature				13 Spouse TIN	14 T				
			/ / MM DD YYYY			type b ☐ SSN/ITIN c ☐ Foreign				
Part II	Indiv	vidual or Entity Authorized to I	File FBAR	on	behalf of Persons wh	no have an	obliga	ation to file.		
15. Preparer last name		16. Preparer first name			17. Preparer M.I. 18. Preparer P		18. Preparer PTIN			
19 Address			20 City			21 State	22 ZII	P/postal code		
23 Country code				25. Employer EIN 26. Preparer				's signature		
services. Th	ne com	Instructions for completing This is a fill and the completed by the individual or entity pleted record must be signed by the individual or er/filing entity must be registered with F	print form granting such ividual(s)/enti	us aut ty gr	ing Adobe Reader thorization (Part I) <u>OR</u> the ir ranting the authorization (Pa	ndividual/entity rt I) and the in	dividual	/entity that will file the		
tion).		e the account owner statement in Part I		L-I II	е зумент. (Эее пар <i>лиза</i> ен	mig.imcen.tre	as.gov/i	nam.num for registra-		
		d party to file the Foreign Bank and Finar on and date the document in Part I, Item				ner should co	mplete l	Part I, items 1 through		
Accounts J	ointly C	Owned by Spouses (see exceptions in	the FBAR in	struc	ctions)					

Complete Part II, items 15 through 18 with the preparer's information. The address, items 19 through 23, is that of the preparer or the preparer's employer if the preparer is an employee. Record the employer's information (if any) in items 24 and 25. If the preparer does not have a PTIN, leave item 18 blank. The third party preparer must sign in item 26 of Part II indicating that the FBAR will be filed as directed by the authorizing authority.

on behalf of both spouses will complete Part II in its entirety (do not use such terms as see above, or same as item number x).

If the account owner is filing an FBAR jointly with his/her spouse, the spouse must also complete Part I, items 4 through 6. The spouse must also sign and date the report in items 11/12, and complete items 13 and 14. A third party preparer may be one of the spouses of the jointly owned foreign account. In this case, both spouses must complete Part I of form 114a in its entirety. The third party preparer (spouse) that will file the FBAR

The person(s) listed in Part I, and the person listed in Part II as authorized to file on behalf of the person(s) listed in Part I, should retain copies of this record of authorization and the filing itself, both for a period of 5 years. See 31 CFR 1010. 430(d).

DO NOT SEND THIS RECORD TO FINCEN UNLESS REQUESTED TO DO SO.