

YES NO

\_\_\_ \_\_\_ If you are self-employed, did you pay health insurance premiums for yourself and your family?

Amount: \$ \_\_\_\_\_

\_\_\_ \_\_\_ Do you contribute any amounts to a Health Savings Account that are not reported on your W2? If yes,

Amount contributed for the year \$ \_\_\_\_\_ Family plan \_\_\_\_\_ or self only \_\_\_\_\_

\_\_\_ \_\_\_ Did you receive any distributions from your Health Savings Account? If yes, please bring statement received.

\_\_\_ \_\_\_ Did you pay alimony? Paid to \_\_\_\_\_ SS No. \_\_\_\_\_ Amount \$ \_\_\_\_\_

\_\_\_ \_\_\_ Did you pay student loan interest this year? Amount \$ \_\_\_\_\_ Bring statement

\_\_\_ \_\_\_ Was anyone listed on your return a college student? We will need the **1098-T and expense amounts**.

**Undergraduate students** may also be able claim the expense of books and course materials required.

**Please bring separate totals for tuition and books/supplies so we can determine which education credit is most beneficial. Note: Room and board is not deductible.**

\_\_\_ \_\_\_ Were any of the above expenses paid from a 529 education plan or a Coverdell IRA? Amount \$ \_\_\_\_\_

\_\_\_ \_\_\_ Did the student receive grants or scholarships that do not need to be repaid?

Do not include student loans in this total. If so, amount of scholarships and/or grants \$ \_\_\_\_\_

\_\_\_ \_\_\_ At the beginning of the tax year, had the student completed less than four years of post-secondary education?

\_\_\_ \_\_\_ Did you contribute money to a 529 Plan for future educational needs of your children, grandchildren or other beneficiary? If yes,

amount contributed during the year \$ \_\_\_\_\_ Beneficiary Name: \_\_\_\_\_

\_\_\_ \_\_\_ If you are an educator, did you purchase classroom supplies for which you were not reimbursed? If yes, amount \$ \_\_\_\_\_ Keep receipts with your tax return. **Maximum deductible is \$250.**

\_\_\_ \_\_\_ Did you have any debts cancelled or reduced, including credit cards or file bankruptcy? Provide 1099-C received.

\_\_\_ \_\_\_ Did you take out a mortgage or refinance an existing home mortgage? If yes, please bring your closing statement (usually 2 pages legal-sized paper). (HUD Statement)

Were any proceeds spent on home improvements? \_\_\_ Yes \_\_\_ No

Nature of improvements: \_\_\_\_\_

\_\_\_ \_\_\_ Did you sell a home? If yes, please bring closing statement so we can gather additional deductions.

\_\_\_ \_\_\_ Did you purchase a home? If yes, bring closing statement, also called HUD Statement.

\_\_\_ \_\_\_ Did you make any energy efficient improvements to your home and have not previously used the maximum credit amount of \$500?

\_\_\_ \_\_\_ Did you transfer a home to or from a parent or other related party or make any gifts totaling more than \$14,000 to any one person during the year? If so, provide recipient's name, address, relationship and amount of the gift.

\_\_\_ \_\_\_ Did you have a financial interest in, or signature authority over, any foreign financial accounts at any time during the tax year? Amount \$ \_\_\_\_\_

\_\_\_ \_\_\_ Did you contribute or receive distributions from a foreign trust? Amount \$ \_\_\_\_\_

\_\_\_ \_\_\_ At any time during the year did you either live or work within the city limits of Kansas City, Mo or St Louis, Mo?

Name(s): \_\_\_\_\_ Date: \_\_\_\_\_