

# 2015 TAX ORGANIZER

## **General Information**

	Taxpayer	Spouse	
First Name			
Middle Initial		<u> </u>	$\neg$
Last Name			
Social Security Number			$\neg$
Date of Birth			_
Date of Death			
	Check ("X") which phone number to list on return	n.	
Home Phone			
Work Phone			
Cell Phone			
Legally Blind		<del></del>	
Claimed as a Dependent		<del>                                     </del>	
Presidential Election Fund (\$3)			
Occupation			$\neg$
E-mail address			-
State of Residence as of 12/31			ī
County of Residence as of 12/31.			_
School District as of 12/31			
Sales tax rate of locality in 2015 .			
If Part Year, Period of Residency .	to	to	_
Filing Status			
Status on 2014 return :			
Status as of 12/31/2015 :	1 Single		
Enter ("X") in the box	2 Married filing joint		
	3 Married filing separately		
	(Enter spouse's name and SSN above)		
	4 Head of Household Non-dependent Non-dependent	name:	
	5 Qualifying widow(er) with minor child	Year spouse died	
Address			
Street		Apt/Suite :	
City	s	State Zip Code	
If address is in a foreign country, en	nter that country		
Foreign province/county		Foreign postal code	
If a bona fide resident of a U.S. terr	itory, enter territory		

	Name		SSN
		<u>.</u>	
	Questions		
Yes No	Basic Information		
	Did your marital status change since last yea	r?	
	Were you in a Registered Domestic Partners		age during 2015?
3	Are there any changes in your dependents fr		age damig 2010.
	Did you have any children under 19 (or 24 if a		more than \$1,050 in investment income?
5	Are all your dependents either US residents		
	Did you provide over half of the support for se		dependent?
7	Are you being claimed (or are eligible to be c		
8	Did you or a member of your family have min		
	may have sent you a Form 1095-A, 1095-B,		
	in minimum essential coverage and shows th		,
9	Did you have a Health Insurance Marketplace		are you claiming a coverage exemption?
10	Were either you or your spouse in the military		
11	Did you purchase or sell your principal reside	ence?	
12	Have you been notified by the IRS of change	s to a prior year's return, or receiv	ved any other tax correspondence?
13	Were there any changes to a prior year's inco	ome, deductions, or credits?	
14	Did you make gifts of more than \$14,000 to a	iny one person?	
15	Did you file Form 8839, Adoption Credit, in a		xpenses in 2015?
16	Did you claim a First-time Homebuyer Credit		
17	Was there a disposition or change in use of y	our main home for which you cla	med the First-time Homebuyer Credit?
18	Do you want to e-file your return?		
19	If you are due a refund, how do you want to r	eceive it?	
	Check sent to you in the mail	Other	quick refund via a bank product
	Apply to next year's estimates		
	Direct deposit (please provide voide	d blank chack)	
		· .	
	Type of account: Checking	Savings	
	If you owe taxes, how do you want to	pay them?	
	Paper check sent with my return	Credit card Instal	Iment Agreement
	Direct debit from my bank account (	olease provide a voided blank che	ack)
	<del>_</del>		on,
	Type of account: Checking	Savings	
20	Do you want to allow your tax preparer to dis	cuss this year's return with the IR	S?
	if no, enter another person (if desired) to be a	allowed to discuss this return with	the IRS:
	Designee's	Phone	Personal identification
	Designee's	Phone	Personal identification
Yes No	Designee's	Phone	Personal identification
Yes No	Designee's name  Income  Did you have an interest in or signature author	Phone Number  ority over a financial account in a	Personal identificationNumber (5 digit PIN)
	Designee's name  Income  Did you have an interest in or signature authorized you the grantor of or transferor to a force	Phone Number  Drity over a financial account in a eign trust?	Personal identification Number (5 digit PIN) foreign country?
1 2 3	Designee's name  Income  Did you have an interest in or signature authors Were you the grantor of or transferor to a fore Did you receive income from a foreign source	Phone Number  ority over a financial account in a eign trust? e or pay taxes to a foreign govern	Personal identification Number (5 digit PIN) foreign country?
1 2 3 3 4	Designee's name  Income  Did you have an interest in or signature authors Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to y	Phone Number  ority over a financial account in a eign trust? e or pay taxes to a foreign govern your employer?	Personal identification Number (5 digit PIN) foreign country?
1 2 3 3 4 5 5	Designee's name  Income Did you have an interest in or signature authors Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to your dyou barter your services for goods or services.	Phone Number  ority over a financial account in a eign trust? e or pay taxes to a foreign govern your employer? vices from someone else?	Personal identification Number (5 digit PIN) foreign country? ment?
1 2 3 4 5 5 6	Designee's name  Income Did you have an interest in or signature authors Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to you do you barter your services for goods or ser Did you receive any tax-exempt income, such	Phone Number  Ority over a financial account in a seign trust? Se or pay taxes to a foreign govern your employer? Voices from someone else? In as interest or dividends from mu	Personal identification Number (5 digit PIN) foreign country? ment?
1 2 3 4 5 6 6 7	Designee's name  Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to you do you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an interest.	Phone Number  Ority over a financial account in a seign trust? Se or pay taxes to a foreign governyour employer? Voices from someone else? In as interest or dividends from must rate below market rate?	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account?
1 2 3 3 4 5 5 6 6 7 8	Designee's name  Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to you do you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intered Did you receive, or expect to receive, a Sche	Phone Number  Ority over a financial account in a seign trust? Se or pay taxes to a foreign governyour employer? Voices from someone else? In as interest or dividends from must rate below market rate?	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account?
1 2 3 4 5 6 7 7 8 9 9	Designee's name  Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to you do you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intered Did you receive, or expect to receive, a Sche Did you cash in any U.S. savings bonds?	Phone Number  Ority over a financial account in a seign trust? Se or pay taxes to a foreign governyour employer? Vices from someone else? In as interest or dividends from must rate below market rate? In dule K-1 (or substitute K-1) from the set of the substitute K-1)	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account?  a trust, estate, partnership, or S corp?
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1 2 3 4 4 5 6 6 7 7 8 9 10 11 12 13	Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to y Did you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intered Did you receive, or expect to receive, a Sche Did you cash in any U.S. savings bonds? Did you own an interest in a Real Estate Mor Did you receive a state or local refund, or a re Did you receive disability income? Do you have gambling winnings? (If yes, be see	Phone Number  Prity over a financial account in a beign trust? For or pay taxes to a foreign governation of the proof of t	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account?  a trust, estate, partnership, or S corp?  C)?  itemized in a prior year? (attach 1099-G)
1 2 3 4 4 5 6 6 7 7 8 8 9 10 11 12 13 13 14	Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to y Did you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intered Did you receive, or expect to receive, a Sche Did you cash in any U.S. savings bonds? Did you own an interest in a Real Estate Mor Did you receive a state or local refund, or a re Did you receive disability income? Do you have gambling winnings? (If yes, be so Did you receive any unemployment benefits?	Phone Number  Prity over a financial account in a beign trust? For or pay taxes to a foreign govern your employer? Vices from someone else? In as interest or dividends from must rate below market rate? I dule K-1 (or substitute K-1) from a stage Investment Conduit (REMI)  Refund of any other deduction you sure to include in gambling expense.	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account?  a trust, estate, partnership, or S corp?  C)?  itemized in a prior year? (attach 1099-G)  ses)
1 2 3 3 4 4 5 6 6 7 7 8 8 9 10 11 12 13 14 15	Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to y Did you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intered Did you receive, or expect to receive, a Sche Did you cash in any U.S. savings bonds? Did you own an interest in a Real Estate Mor Did you receive a state or local refund, or a re Did you receive disability income? Do you have gambling winnings? (If yes, be so Did you receive any unemployment benefits? During 2015, did you receive payments from	Phone Number  Prity over a financial account in a beign trust? For or pay taxes to a foreign governation of the proof of t	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account?  a trust, estate, partnership, or S corp?  C)?  itemized in a prior year? (attach 1099-G)  ses)
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1 2 3 4 4 5 6 6 7 7 8 8 9 9 10 11 12 13 14 15 16 17	Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to y Did you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intere Did you receive, or expect to receive, a Sche Did you cash in any U.S. savings bonds? Did you own an interest in a Real Estate Mor Did you receive a state or local refund, or a re Did you receive disability income? Do you have gambling winnings? (If yes, be so Did you receive any unemployment benefits? During 2015, did you receive payments from Did you receive employer-provided adoption Did you receive any distributions from a retire	Phone Number  Prity over a financial account in a seign trust? For or pay taxes to a foreign governation of the property of th	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account? a trust, estate, partnership, or S corp?  C)? itemized in a prior year? (attach 1099-G) ses)  ses)
1 2 3 3 4 4 5 6 6 7 7 8 9 10 11 12 13 14 15 16 17 18	Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to y Did you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intered Did you receive, or expect to receive, a Sche Did you cash in any U.S. savings bonds? Did you own an interest in a Real Estate Mor Did you receive a state or local refund, or a re Did you receive disability income? Do you have gambling winnings? (If yes, be so Did you receive any unemployment benefits? During 2015, did you receive payments from Did you receive employer-provided adoption Did you receive any distributions from a retire Did you rollover a retirement plan distribution	Phone Number  Prity over a financial account in a seign trust? For or pay taxes to a foreign governation of the property of th	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account? a trust, estate, partnership, or S corp?  C)? itemized in a prior year? (attach 1099-G) ses)  ses)
1 2 3 3 4 4 5 6 6 7 7 8 9 10 11 12 13 14 15 16 17 18 19	Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to y Did you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intere Did you receive, or expect to receive, a Sche Did you cash in any U.S. savings bonds? Did you own an interest in a Real Estate Mor Did you receive a state or local refund, or a re Did you receive disability income? Do you have gambling winnings? (If yes, be so Did you receive any unemployment benefits? During 2015, did you receive payments from Did you receive employer-provided adoption Did you receive any distributions from a retire Did you receive Social Security benefits?	Phone Number  Ority over a financial account in a seign trust? The or pay taxes to a foreign governation of the property of th	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account? a trust, estate, partnership, or S corp?  C)? itemized in a prior year? (attach 1099-G)  ses)  utract?  99-Rs)
1 2 3 3 4 4 5 6 6 7 7 8 8 9 10 11 12 13 13 14 15 15 16 16 17 18 19 20	Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to y Did you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intered Did you receive, or expect to receive, a Sche Did you cash in any U.S. savings bonds? Did you own an interest in a Real Estate Mor Did you receive a state or local refund, or a re Did you receive disability income? Do you have gambling winnings? (If yes, be so Did you receive any unemployment benefits? During 2015, did you receive payments from Did you receive any distributions from a retire Did you rollover a retirement plan distribution Did you receive Social Security benefits? During 2015, did you receive a housing allow	Phone Number  Ority over a financial account in a seign trust? The or pay taxes to a foreign governation of the property of th	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account? a trust, estate, partnership, or S corp?  C)? itemized in a prior year? (attach 1099-G)  ses)  utract?  99-Rs)
1 2 3 3 4 4 5 6 6 7 7 8 8 9 10 11 12 13 13 14 15 16 17 18 19 20 21	Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to y Did you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intered Did you receive, or expect to receive, a Sche Did you cash in any U.S. savings bonds? Did you own an interest in a Real Estate Mor Did you receive a state or local refund, or a re Did you receive disability income? Do you have gambling winnings? (If yes, be so Did you receive any unemployment benefits? During 2015, did you receive payments from Did you receive any distributions from a retire Did you receive any distributions from a retire Did you receive Social Security benefits? During 2015, did you receive a housing allow Did you receive alimony?	Phone Number  Ority over a financial account in a seign trust? The or pay taxes to a foreign governation of the pay taxes of the	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account? a trust, estate, partnership, or S corp?  C)? itemized in a prior year? (attach 1099-G)  ses)  utract?  99-Rs)
1 2 3 3 4 4 5 6 6 7 7 8 8 9 10 11 12 13 13 14 15 15 16 16 17 18 19 20	Income Did you have an interest in or signature author Were you the grantor of or transferor to a force Did you receive income from a foreign source Did you receive tip income NOT reported to y Did you barter your services for goods or ser Did you receive any tax-exempt income, such Did you make a loan to someone at an intered Did you receive, or expect to receive, a Sche Did you cash in any U.S. savings bonds? Did you own an interest in a Real Estate Mor Did you receive a state or local refund, or a re Did you receive disability income? Do you have gambling winnings? (If yes, be so Did you receive any unemployment benefits? During 2015, did you receive payments from Did you receive any distributions from a retire Did you rollover a retirement plan distribution Did you receive Social Security benefits? During 2015, did you receive a housing allow	Phone Number  Ority over a financial account in a beign trust? The or pay taxes to a foreign governation of the pay taxes of the	Personal identification Number (5 digit PIN)  foreign country?  ment?  unicipal bonds or a mutual fund account? a trust, estate, partnership, or S corp?  C)? itemized in a prior year? (attach 1099-G)  ses)  tract?  99-Rs)

	25	Did you receive Form 2439?
	26	Did you buy or sell any bonds?
	27	Did you receive stock from a stock bonus plan with your employer?
	28	Did you sell any other personal assets at a gain?
	29	Did you sell any real estate (other than your home) during the year?
	30	Did you sell any assets using the installment method?
	31	Did you receive proceeds from a prior year installment sale?
	32	Did you purchase a rental property?
	33	Did you exchange any property for other property?
	34	Did you receive any income not reported in this Organizer?
Yes	No	Business and Rental Property Income
	1	If you own rental property, do you qualify as a Real Estate Professional?
	2	Did you start or acquire a new business?
	3	Did you sell any part of an existing business, or sell business assets?
	4	Did you cease operating any business or rental property?
	5	Did you remove any of your business assets for personal use?
Yes	No	Business and Rental Property Deductions
	1	Did you use part of your home for business purposes?
		Did you make any contributions to a Keogh or a self-employed SEP plan for 2015?
	3	Do you pay for any health or long term care insurance through your business?
	4	If you or your spouse are self-employed, are either of you covered under an employer's health plan?
	5	Did you purchase any furniture or equipment for your business?
Yes		
Yes	5	Did you purchase any furniture or equipment for your business?  Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?
Yes	5 No_	Did you purchase any furniture or equipment for your business?  Other Deductions
Yes	No 1	Did you purchase any furniture or equipment for your business?  Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you use your car on the job (other than to and from work)?
Yes	No 1 2	Did you purchase any furniture or equipment for your business?  Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you use your car on the job (other than to and from work)?  Did you work out of town for part of the year?
Yes	No 1 2 3 4 5 5	Did you purchase any furniture or equipment for your business?  Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you use your car on the job (other than to and from work)?  Did you work out of town for part of the year?  Did you incur any travel and entertainment expenses for business purposes?
Yes	No 1 2 3 4 5 6	Other Deductions Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015? Did you make any contributions to HSA (Health Savings Account) in 2015? Did you use your car on the job (other than to and from work)? Did you work out of town for part of the year? Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work?
Yes	No 1 2 3 4 5 6 7	Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you use your car on the job (other than to and from work)?  Did you work out of town for part of the year?  Did you incur any travel and entertainment expenses for business purposes?  Did you pay expenses for the care of your child or other dependent so you could work?  Did you lose property or have damage to a property due to a casualty, theft, or condemnation?
Yes	No 1 2 3 4 5 6 7 8	Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you use your car on the job (other than to and from work)?  Did you work out of town for part of the year?  Did you incur any travel and entertainment expenses for business purposes?  Did you pay expenses for the care of your child or other dependent so you could work?  Did you lose property or have damage to a property due to a casualty, theft, or condemnation?  Did any security become worthless during 2015?
Yes	No 1 2 3 4 5 6 7 8 9	Other Deductions Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015? Did you make any contributions to HSA (Health Savings Account) in 2015? Did you use your car on the job (other than to and from work)? Did you work out of town for part of the year? Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you lose property or have damage to a property due to a casualty, theft, or condemnation? Did any security become worthless during 2015? Did any debts become uncollectible during 2015?
Yes	5 No 1 2 3 4 5 6 7 8 9 10	Other Deductions Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015? Did you make any contributions to HSA (Health Savings Account) in 2015? Did you use your car on the job (other than to and from work)? Did you work out of town for part of the year? Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you lose property or have damage to a property due to a casualty, theft, or condemnation? Did any security become worthless during 2015? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2015?
Yes	5 No 1 2 3 4 5 6 7 8 9 10 11	Other Deductions Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015? Did you make any contributions to HSA (Health Savings Account) in 2015? Did you use your car on the job (other than to and from work)? Did you work out of town for part of the year? Did you incur any travel and entertainment expenses for business purposes? Did you pay expenses for the care of your child or other dependent so you could work? Did you lose property or have damage to a property due to a casualty, theft, or condemnation? Did any security become worthless during 2015? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2015? Did you make energy efficient improvements to your home or purchase any energy-saving property during 2015?
Yes	5 No 1 2 3 4 5 6 7 8 9 10 11 12	Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you use your car on the job (other than to and from work)?  Did you work out of town for part of the year?  Did you incur any travel and entertainment expenses for business purposes?  Did you pay expenses for the care of your child or other dependent so you could work?  Did you lose property or have damage to a property due to a casualty, theft, or condemnation?  Did any security become worthless during 2015?  Did you purchase a 'clean fuel' or electric hybrid vehicle in 2015?  Did you make energy efficient improvements to your home or purchase any energy-saving property during 2015?  Did you contribute less than an entire interest in any property to charity?
Yes	5 No 1 2 3 4 5 6 7 8 9 10 11 12 13	Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you use your car on the job (other than to and from work)?  Did you work out of town for part of the year?  Did you incur any travel and entertainment expenses for business purposes?  Did you pay expenses for the care of your child or other dependent so you could work?  Did you lose property or have damage to a property due to a casualty, theft, or condemnation?  Did any security become worthless during 2015?  Did you purchase a 'clean fuel' or electric hybrid vehicle in 2015?  Did you make energy efficient improvements to your home or purchase any energy-saving property during 2015?  Did you contribute less than an entire interest in any property to charity?  Did you refinance a mortgage or take out a home equity loan during 2015?
Yes	5 No 1 2 3 4 5 6 7 8 9 10 11 12 13 14	Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you use your car on the job (other than to and from work)?  Did you work out of town for part of the year?  Did you incur any travel and entertainment expenses for business purposes?  Did you lose property or have damage to a property due to a casualty, theft, or condemnation?  Did any security become worthless during 2015?  Did you purchase a 'clean fuel' or electric hybrid vehicle in 2015?  Did you make energy efficient improvements to your home or purchase any energy-saving property during 2015?  Did you contribute less than an entire interest in any property to charity?  Did you refinance a mortgage or take out a home equity loan during 2015?  Did you incur moving expenses during the year due to a change of employment?
Yes	5 No 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15	Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you use your car on the job (other than to and from work)?  Did you work out of town for part of the year?  Did you incur any travel and entertainment expenses for business purposes?  Did you pay expenses for the care of your child or other dependent so you could work?  Did you lose property or have damage to a property due to a casualty, theft, or condemnation?  Did any security become worthless during 2015?  Did you purchase a 'clean fuel' or electric hybrid vehicle in 2015?  Did you make energy efficient improvements to your home or purchase any energy-saving property during 2015?  Did you contribute less than an entire interest in any property to charity?  Did you refinance a mortgage or take out a home equity loan during 2015?  Did you pay any educational tuition or fees for you or a dependent?
Yes	5 No 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16	Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you work out of town for part of the year?  Did you incur any travel and entertainment expenses for business purposes?  Did you lose property or have damage to a property due to a casualty, theft, or condemnation?  Did any security become worthless during 2015?  Did you purchase a 'clean fuel' or electric hybrid vehicle in 2015?  Did you make energy efficient improvements to your home or purchase any energy-saving property during 2015?  Did you refinance a mortgage or take out a home equity loan during 2015?  Did you pay any educational tuition or fees for you or a dependent?  Did you pay any student loan interest?
Yes	5 No 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17	Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you wake any contributions to HSA (Health Savings Account) in 2015?  Did you wake any contributions to HSA (Health Savings Account) in 2015?  Did you work out of town for part of the year?  Did you work out of town for part of the year?  Did you pay expenses for the care of your child or other dependent so you could work?  Did you lose property or have damage to a property due to a casualty, theft, or condemnation?  Did any security become worthless during 2015?  Did you purchase a 'clean fuel' or electric hybrid vehicle in 2015?  Did you make energy efficient improvements to your home or purchase any energy-saving property during 2015?  Did you contribute less than an entire interest in any property to charity?  Did you refinance a mortgage or take out a home equity loan during 2015?  Did you incur moving expenses during the year due to a change of employment?  Did you pay any educational tuition or fees for you or a dependent?  Did you make any federal or state estimated payments?
Yes	5 No 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16	Other Deductions  Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2015?  Did you make any contributions to HSA (Health Savings Account) in 2015?  Did you work out of town for part of the year?  Did you incur any travel and entertainment expenses for business purposes?  Did you lose property or have damage to a property due to a casualty, theft, or condemnation?  Did any security become worthless during 2015?  Did you purchase a 'clean fuel' or electric hybrid vehicle in 2015?  Did you make energy efficient improvements to your home or purchase any energy-saving property during 2015?  Did you refinance a mortgage or take out a home equity loan during 2015?  Did you pay any educational tuition or fees for you or a dependent?  Did you pay any student loan interest?

Federal, State and Local Estima	ated Taxes	Paid						
Federal Estimates		Fi	iler and/or Joi	nt Pavments		Spouse On	ly Payments	
Enter Payment Information  1 Overpayment from last year  2 First quarter payment  3 Second quarter payment  4 Third quarter payment  5 Fourth quarter payment  6  7		·	Date Paid	Amount		Date Paid	Amou	unt
State Estimates								
Enter two-letter state abbreviation	State		State		State		State	
Enter Payment Information  1 Overpayment from last year . 1  2 First quarter payment 2  3 Second quarter payment 3  4 Third quarter payment 4  5 Fourth quarter payment 5  6 6 7 6  7 8 8		Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Local Estimates								
Enter locality name  Enter Payment Information  1 Overpayment from last year . 1  2 First quarter payment 2  3 Second quarter payment 3  4 Third quarter payment 4		Amount	_ Locality  Date Paid	Amount	_ Locality  Date Paid	Amount	Date Paid	Amount
5 Fourth quarter payment 5 6 6 7 7 8 8								

SSN \_\_\_\_

Name \_\_\_\_

Name	SSN	
		_

### **Dependent Information**

Dependent		No. of						Enter "X" if	applicable	
		Months				Amount Paid	US	Full- time	Paid	Not a
		in Home		Date of		for Dependent	Citizen	Student or	Education	Dependent
First Name	Last Name	in 2015	Relationship	Birth	SSN	Care Expenses		Disabled	Expenses	this Year
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## Wages

#### W-2 Information

"X" if		Box 1 Wages, Tips	Box 2 Federal Income	Box 10 State	
spouse	Employer's Name	Other Comp	Tax Withheld	Wages	s Tax Withheld
1 _					
2 3					
4					
5					
6					
7					
8					
9 _					
10_					
11 12				-	
13					
14					
15					
16				1	
17					
18					
19					
20					
21				-	
22 23					
24					
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26					
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29					
30					
31				-	
32 33				-	
33 -					
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36					
37					
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41					
42 43					
43 –					
45					
46				1	
47				1	
48					
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50					
51					
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53					
54 55				<del>                                     </del>	
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Name SSN
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## **Retirement Income**

#### 1099-R Information

"X" if	Box 1 Gross	Box 4 Federal Income	Box 14 State	Box 12 State Income
spouse Payer's Name	Distribution	Tax Withheld	Distribution	Tax Withheld
1	Distribution		<u> </u>	
2				
3				
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11 12				
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Name _	SSN	

#### **Interest Income**

Please provide copies of all Form 1099-INT or other statements reporting interest income.

\* F/S/ La enter ownership (F)iller (S)nouse

Taxable Interest Income

Tax Exempt Interest

					v Act Interest
<b>Current Year</b>	Prior Year	<b>Current Year</b>	Prior Year	<b>Current Year</b>	Prior Year
Amount		Amount	Amount	Amount	Amount
	·				
	Taxable Intel Current Year Amount		Current Year   Prior Year   Current Year	Current Year   Prior Year   Current Year   Prior Year	Current Year   Prior Year   Current Year   Prior Year   Current Year

#### **Dividend Income**

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

* F/S/J - enter ownership (F)iler, (S)pouse,	- enter ownership (F)iler, (S)pouse, Ordinary Dividends Qualified Dividends			Capital Gains		
or (J)oint.	<b>Current Year</b>	Prior Year	<b>Current Year</b>	Prior Year	<b>Current Year</b>	Prior Year
F/S/J Payer	Amount	Amount	Amount	Amount	Amount	Amount
1						
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3						
4						
5						
6						
7						
8						
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Foreign Country Foreign Province/State . Postal Code  General Check Boxes (Enter "X" where applicable)  1 Accounting Method	ZipNo  Year Prior Ye nt Amoun  Prior Yes Year Prior Yes	ployer Identification Number				
City	No  Year Prior Year  Amount  Year Yes  Year Prior Ye	siness name	(do not enter Social Security Number)			
General Check Boxes (Enter "X" where applicable)  1	Year Prior Ye nt Amoun  Prior Ye  Year Yes  Year Prior Ye	eign Country			Zip	
1 Accounting Method	Year Prior Ye nt Amoun  Prior Ye  Year Yes  Year Prior Ye		Postal	Code		
2 Did you "materially participate" in this business? Yes No 3 Check ('X') if you started or acquired this business in 2015.  4 Did you make any payments in 2015 that would require you to file Form(s) 1099? Yes No Business Income  * Report statutory income as W-2 income.  5 Income reported on 1099 MISC. 5 Gross receipts or sales not reported on Form 1099 or Form W-2 6 6 6 7 7 7 8 8 8 9 9 9 9 10 Returns and allowances 10 11 Other income 11 Unventory (Enter "X" where applicable) 12 Method(s) used to value closing inventory Cost Lower of cost or market Other 13 Any change in determining quantities, costs, or valuations between opening and closing inventory?  Current Year Amount Current Year Amount 14 Inventory at the beginning of year 14 Inventory at the beginning of year 14 Inventory at the beginning of year 15 Cost of labor 16 Cost of labor 17 Materials and supplies 17 Inventory at end of year 19 Date Placed In Service	Year Prior Ye nt Amoun  Prior Ye  Year Yes  Year Prior Ye	( <u></u>				
3 Check ("X") if you started or acquired this business in 2015.  4 Did you make any payments in 2015 that would require you to file Form(s) 1099?  Business Income * Report statutory income as W-2 income. 5 Income reported on 1099 MISC. Gross receipts or sales not reported on Form 1099 or Form W-2 6 6 7 7 8 8 8 9 9 9 10 Returns and allowances 10 11 Other income 11 Other income 11 Other income 11 Other income 11 Other where applicable) 12 Method(s) used to value closing inventory Cost Lower of cost or market Other 13 Any change in determining quantities, costs, or valuations between opening and closing inventory?  Linventory at the beginning of year 14 Inventory at the beginning of year 14 Inventory at the beginning of year 15 Purchases less cost of items withdrawn for personal use 15 Other Costs 18 Other Costs 18 Other Costs 18 Other Costs 18 Other Costs 19 Inventory at end of year 19 Inventory at end of year 19 Date Placed In Service	Year Prior Ye nt Amoun  Prior Ye  Year Yes  Year Prior Ye					
Business Income * Report statutory income as W-2 income. 5 Income reported on 1099 MISC. Gross receipts or sales not reported on Form 1099 or Form W-2 6 6 7 7 8 8 8 9 9 10 Returns and allowances 10 Under income 11 Unventory (Enter "X" where applicable) 12 Method(s) used to value closing inventory	Year Prior Ye nt Amoun  Prior Ye  Yes  Year Prior Ye					
Business Income  * Report statutory income as W-2 income.  5 Income reported on 1099 MISC.  Gross receipts or sales not reported on Form 1099 or Form W-2  6 7 7 8 8 9 9 9 10 Returns and allowances 10 10 11 Other income 11 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Year Prior Ye nt Amoun  Prior Ye  Yes  Year Prior Ye		   - F(-) 40000		l., .	
* Report statutory income as W-2 income.  Income reported on 1099 MISC.  Gross receipts or sales not reported on Form 1099 or Form W-2  6 7 7 8 8 8 9 10 Returns and allowances 10 11 Other income 11  Inventory (Enter "X" where applicable) 12 Method(s) used to value closing inventory Cost Lower of cost or market Other 13 Any change in determining quantities, costs, or valuations between opening and closing inventory?  Current Year Amount  14 Inventory at the beginning of year 14 15 Purchases less cost of items withdrawn for personal use 15 16 Cost of labor 16 17 Materials and supplies 17 18 Other Costs 18 19 Inventory at end of year 19  Assets Placed in Service This Year Description:  Date Placed In Service	rt Amoun	you make any payments in 2015 that would require you to fi	ле Form(s) 1099?	Yes	INO	
Gross receipts or sales not reported on Form 1099 or Form W-2  6		eport statutory income as W-2 income.	5		Prior Yea Amount	
7						
8 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9						
Set   Set			•			
Inventory (Enter "X" where applicable)  Method(s) used to value closing inventory						
Inventory (Enter "X" where applicable)  12 Method(s) used to value closing inventory						
Method(s) used to value closing inventory						
Any change in determining quantities, costs, or valuations between opening and closing inventory?  Current Year Amount  Inventory at the beginning of year  14			Lower of cost or market	Other		
Amount  14 Inventory at the beginning of year  15 Purchases less cost of items withdrawn for personal use  16 Cost of labor					Yes N	
14 Inventory at the beginning of year	nt Amour			Current Year	Prior Yea	
15 Purchases less cost of items withdrawn for personal use 16 Cost of labor				Amount	Amount	
16 Cost of labor       16         17 Materials and supplies       17         18 Other Costs       18         19 Inventory at end of year       19         Assets Placed in Service This Year Description:       Date Placed In Service						
17 Materials and supplies						
Assets Placed in Service This Year Description:  19  Date Placed In Service		chases less cost of items withdrawn for personal use				
Assets Placed in Service This Year  Description:  Date Placed In Service		chases less cost of items withdrawn for personal use st of labor				
Description: In Service		chases less cost of items withdrawn for personal use	<b>19</b>			
Description: In Service	cod Durchae	chases less cost of items withdrawn for personal use		Date Placed	Purchase	
_ ·		chases less cost of items withdrawn for personal use			Amount	
A A	Amour	chases less cost of items withdrawn for personal use		in Service	, unount	
В		chases less cost of items withdrawn for personal use	Α	in Service		
		chases less cost of items withdrawn for personal use stof labor terials and supplies errosts entory at end of year scription:	В	in Service		
E E		chases less cost of items withdrawn for personal use stof labor terials and supplies errosts entory at end of year scription:	В	in Service		

	Name		SSN		
Rea	I Estate Rentals	and Royalties			
Ad Ci Fd	operty Description ddress ty oreign Country oreign Province/State	StateZipPostal Code			
4-	O	And Elling Consequence India.	4-	Current Year Info	Prior Year Info
1a 1b	Enter property type nu (1) Single-Family Resi	ter Filer, Spouse, or Joint)	1b		
2 3	Enter "X" if property w than 14 days or 10% of <b>3a</b> If entered ('	y participated? as used for personal use by you or your family for more if the total days rented?  (X"), enter the number of days of personal use?  (X"), enter the number of days rented?	3 3a		
Inco 4 5	Royalty received Rent received a If rental rea b Rental use	l estate, enter the percent of ownership if less than 100% percentage for property used partially for personal use only	5 5a	Current Year Amounts	Prior Year Amounts
Prop	erty Expense			Current Year	Prior Year
7 8 9 10 11 12 13 14 15 16 17	Advertising		8 9 10 11 12 13a 13b 14 15 16 17a 17b	Amounts	Amounts
A B C D E	ssets Placed in Ser Description:	vice This Year	A B C D E	Date Placed In Service	Purchase Amount

eartnerships, S corporations, or estates and trusts.  F/S/J - enter ownership (F)iler, (S)pouse, or (J)oint.	Enter "S" if K1 (1120S)  Enter "P" if K1 (1065)  Partnershi	
F/S/J Entity Name	Enter "E" if K1 (1041) Current	
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