



**Affordable Care Act requires proof of health insurance for each individual claimed on return**

**Check if you have included:** \_\_\_\_\_ 1095A (comes from Marketplace)  
\_\_\_\_\_ 1095B (comes from insurance company)  
\_\_\_\_\_ 1095C (comes from employer)

**If none of forms above are provided, check proof being provided below:**

\_\_\_\_\_ Statement of coverage from Insurance Company showing who was covered and dates  
\_\_\_\_\_ Social Security Statement showing Medicare premiums  
\_\_\_\_\_ Insurance bills for each month showing premiums paid if shows who had coverage  
\_\_\_\_\_ Other documentation showing dates of coverage and who was covered

**Do you have any bank accounts located in any country other than the US?**    \_\_\_yes            \_\_\_ no

**Do you own real estate in any country other than the US?**                    \_\_\_yes            \_\_\_ no

**Do you have any investments located in any country other than the US?**    \_\_\_yes            \_\_\_ no

*If yes, there may be additional filing requirements. We will call you if you answered yes to any of the above.*

**Address if you have moved since last year’s tax return was filed:**

\_\_\_\_\_

**Preferences for your copy of the tax return:**    \_\_\_paper copy            \_\_\_ e-mailed to you  
\_\_\_\_\_ both (\$3.00 charge for both)

\_\_\_ Refunds to be mailed                    \_\_\_ Balance due – check to be mailed

\_\_\_ Direct deposit any refunds            \_\_\_ Withdraw any balance due on April 15<sup>th</sup>

To verify we have the right bank info, provide the last 4 digits of the account number: \_\_\_\_\_

\_\_\_check here if information will be provided when e-filing forms are signed

Prefer to be contacted by \_\_\_ phone    \_\_\_ email    \_\_\_no preference

Telephone #: \_\_\_\_\_ email address: \_\_\_\_\_

Latest time at night that we can call: \_\_\_ 8pm \_\_\_9pm \_\_\_10pm \_\_\_11pm  
other limits: \_\_\_\_\_

Copy of state ID or driver’s license provided:    \_\_\_Taxpayer            \_\_\_Spouse (write N/A if not applicable)

**This is a new requirement to e-file a NYS tax return this year.**

**If no ID provided, the NYS tax return must be mailed and cannot be e-filed**

\_\_\_\_\_  
Signature of Taxpayer  
Only one signature is required for a joint tax return

\_\_\_\_\_  
Date