

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 15th

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