

PLEASE CHECK THE APPROPRIATE BOX. IF YES, PLEASE PROVIDE DOCUMENTATION.

YES	NO	
		Personal Information
		Did your marital status change during the year?
		Did your address or phone number change from last year?
		Are you or your spouse legally blind or disabled?
		Would you like any refunds you receive to be direct deposited? (provide a voided check if you have not previously had direct deposit)
		Has your bank account changed? (provide a voided check)
		Would you like to provide an email address for KBA correspondence? _____
		Dependent Information
		Were there any changes in dependents from the prior year?
		Do you have any children under 19, or students under 24, with investment income exceeding \$2,100?
		Do you have dependents who must file a tax return?
		Did you provide over half of the support for any person, other than children under 19 or students under 24?
		Did you pay for dependent care, including preschool, while you worked or looked for work?
		Did you incur any expenses associated with the adoption of a child?
		Health Care Information
		Did you, your spouse, and dependents have qualified health care coverage for every month of 2016? (provide Form 1095-B)
		Did you enroll in health care coverage through MNSure? (provide Form 1095-A)
		Did you pay for health insurance or contribute to an HSA with after-tax dollars?
		Did you pay long-term care (nursing home) premiums? (provide policy name, number, and amount)
		Purchases, Sales and Debt Information
		Did you sell, exchange, or purchase any real estate or rental property? (provide closing statement)
		Did you refinance a mortgage or take out a home equity loan? (provide closing statement)
		Did you have any debt forgiven, or did you foreclose or abandon property during the year?
		Did you pay sales tax on any major purchases during the year (cars, boats, etc.)?
		Did you pay any student loan interest this year? (provide Form 1098-E)
		Itemized Deduction Information
		Do you have evidence to substantiate charitable cash contributions?
		Did you make any non-cash charitable contributions? (provide details)
		Did you receive any expense reimbursements from your employer, including per diem and sub pay?
		Did you have any unreimbursed employee expenses, including unreimbursed mileage?
		Did you have any expenses related to seeking a new job during the year?
		Did you renew your vehicle tabs? (provide documentation)
		Did you pay mortgage interest? (provide statements)
		Did you pay real estate taxes? (provide statements)
		Miscellaneous Information
		Did you make energy efficient improvements to your home during the year?
		Did you utilize an area of your home exclusively for business purposes?
		Did you retire or change jobs this year?
		Did you receive any Social Security benefits during the year?
		Did you pay rent for your residence, and if so, did you receive a Certificate of Rent Paid?
		Did you pay for college tuition and books? (provide Form 1098-T, student name, year in school, and amounts)
		Did you pay any K-12 education expenses? (provide student name, year in school, and amounts)
		Did you make any estimated payments? (provide amounts and dates of payments)
		Did you make any individual contributions to a Traditional or Roth IRA? Self: Traditional IRA \$_____ Roth IRA \$_____ Spouse: Traditional IRA \$_____ Roth IRA \$_____
		Did you have financial interest in or signature authority over a foreign bank account?
		Did you receive correspondence from the State or the IRS? (provide documentation)
		Do you want to designate \$3 to the Presidential Election Campaign Fund? Checking yes will not change your tax or reduce your refund.
		Do you want to allocate \$5 to the State Elections Campaign Fund? Which party? _____ Checking yes will not change your tax or reduce your refund.
		Do you want to contribute to the Minnesota Nongame Wildlife Fund? If yes, amount \$_____
		Checking yes will change your tax or reduce your refund. If checked yes an amount must be indicated above.