

Happy New Year! Tax season is upon us once again. This year brings about new tax forms and new tax laws.

The Affordable Care Act brought changes and the rules are still in place for one last year.

One last time, there are basic questions which I will need to ask regarding your healthcare.

- Did you have health insurance provided by your employer, purchased privately or covered by Medicare during all of 2018?

If so, please provide Form(s) 1095-B and/or 1095-C. If you did not receive these forms, please provide copies of your insurance cards for 2018 or a statement reflecting coverage for 2018.

- Were all family members covered for the entire year? \_\_\_\_\_

If you did not have insurance for the entire year, how many months were you not covered? \_\_\_\_\_

If not all family members were covered, who was **not** covered? \_\_\_\_\_

- Did you obtain health insurance through the exchange/marketplace?

If so, did you receive an advance premium tax credit? \_\_\_\_\_

If so, please provide the Form 1095-A sent to you from the marketplace.

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To expedite the personal returns, we thought we would ask these questions as well:

Is your bank account the same as last year? \_\_\_\_\_ If not, please provide:

Your bank name \_\_\_\_\_

Your account number \_\_\_\_\_ OR Please provide a voided check

Your routing number \_\_\_\_\_

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Illinois is once again asking whether you purchased any items on the internet, from a catalog or while traveling out of state without paying sales tax. If you live outside of Illinois and your state also taxes assesses use tax, please be sure to answer these questions.

Did you have any untaxed purchases in 2018? \_\_\_\_\_ If so, please provide the amount of untaxed purchases. \_\_\_\_\_

This amount will be multiplied by 6.25% for Illinois, in order to calculate the amount of use tax to be paid for the year.

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My tax software required this information for the first time last year. We must now enter driver's license information. Please provide the following for yourself (and your spouse, if applicable) or confirm that the information provided last year has not changed:

Driver's License number: \_\_\_\_\_

State of Issue: \_\_\_\_\_

Issue Date: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

I thank you in advance for answering the above questions. I look forward once again to working with you this year!