



Div DID YOU HAVE **DIVIDEND INCOME**? YES NO If yes, attach form(s) **1099-DIV**

1099 DID YOU RECEIVE DISTRIBUTIONS FROM **PENSIONS, RETIREMENT, IRAs**? YES NO If yes, provide form(s) **1099-R**

99G/HI9 DID you receive **REFUND OF STATE/LOCAL TAXES** & itemized prior year return? YES NO If yes, attach form(s) **1099-G**

3 DID YOU **RECEIVE ALIMONY**? YES NO If yes, provide total amount received for year: \$ \_\_\_\_\_

C WERE YOU/SPOUSE **SELF-EMPLOYED** IN 200X? YES NO If yes, attach form(s) **1099-MISC** & totaled income/expenses.

D DID YOU **SELL ANY STOCKS OR MUTUAL FUNDS**? YES NO If yes, attach form(s) **1099-B** & purchase date / basis

Roth DID YOU/SPOUSE **CONVERT A REGULAR IRA TO ROTH IRA**? YES NO If Yes, provide form(s) 1099-R and, if you had prior nondeductible contributions, attach prior year's form **8606s**

Taxpayer: \$ \_\_\_\_\_ converted, Pre-conversion basis \$ \_\_\_\_\_ Total nondeductible contributions before conversion \$ \_\_\_\_\_

Spouse: \$ \_\_\_\_\_ converted, Pre-conversion basis \$ \_\_\_\_\_ Total nondeductible contributions before conversion \$ \_\_\_\_\_

3 DID YOU/SPOUSE **CONVERT A REGULAR IRA TO ROTH IRA** IN 1998 AND CHOSE TO SPREAD TAXABLE AMOUNT OVER FOUR YEARS? YES NO If Yes, provide form(s) taxable amount from 1998 form 8606

D, if taxable DID YOU **SELL YOUR HOME** in 200X? YES NO If yes, indicate date of sale: \_\_\_\_\_. You may be able to exclude gain from sale of residence if you owned & lived in home at least 2 out of the last 5 years.

E & 4562 ARE YOU A **LANDLORD** WITH RENTAL INCOME/EXPENSES? YES NO If yes, attach totaled rent received, expenses, including form **1098** (Mortgage Interest Statement), & depreciation information

99G DID YOU RECEIVE **UNEMPLOYMENT COMPENSATION**? YES NO If yes, attach **1099-G** or amount \$ \_\_\_\_\_)

Misc **COMBAT ZONE**: DID YOU SERVE IN THE PERSIAN GULF OR IN THE QUALIFIED HAZARDOUS DUTY AREA OF BOSNIA, CROATIA, HERZAGOVINA, MACEDONIA, SERBIA/MONTENEGRO, ALBANIA OR THE ADRIATIC SEA, AND IONIAN SEA (north of the 39<sup>th</sup> parallel) IN 200X? YES No # Months Deployed \_\_\_\_\_ Redeployment Date: \_\_\_\_\_

ST DID YOU/SPOUSE WORK OUTSIDE THE MILITARY in 200X? YES NO

**ADJUSTMENTS:** (Circle answers applicable to you & spouse, and provide/attach appropriate documentation)

8606 DID YOU/SPOUSE CONTRIBUTE TO A **REGULAR** (not a Roth or Educational) 200X IRA OR INTEND TO CONTRIBUTE BY APRIL 16, 200X+1? YES NO (If yes, provide contribution amount for taxpayer (\$ \_\_\_\_\_) & spouse (\$ \_\_\_\_\_)). Note: Beginning in 1998, eligibility amount for IRA deduction increased. Also, although service members are covered by a retirement plan, their spouses not covered by a retirement plan can take full contribution.

4 DID YOU PAY **STUDENT LOAN INTEREST**? YES NO If yes, attach form 1098-E (Student Loan Interest).

4 DID YOU **PAY ALIMONY**? YES NO If yes, provide annual amount: \$ \_\_\_\_\_ & recipient's ssn: \_\_\_\_\_  
Note: Child support payments are not alimony & are neither deductible by the payer, nor taxable to the payee.

3903 DID YOU/SPOUSE HAVE **UNREIMBURSED MOVING EXPENSES** (amounts in excess of DLA) in 200X? YES NO

ST **PUT ANY STATE SPECIFIC ISSUES HERE, SUCH AS IF THE STATE ALLOWS AN EXCLUSION FOR MILITARY (ACTIVE, RESERVE, OR NATIONAL GUARD) INCOME. YES NO**

**CHILDREN & OTHER DEPENDENTS:** *Reminder: SSNs and full names must match Social Security cards exactly*

2 # OF CHILDREN WHO LIVED WITH YOU: \_\_\_\_\_ # OF CHILDREN WHO DID NOT LIVE WITH YOU DUE TO SEPARATION OR DIVORCE THAT YOU CAN CLAIM AS EXEMPTION: \_\_\_\_\_ (Noncustodial parent should have IRS Form 8332, Release of Claim to Exemption for Child of Divorced or Separated Parents; a Separation Agreement; or, Divorce Decree to claim exemption.) # OF OTHER DEPENDENTS: \_\_\_\_\_

Dependent's First & Last Name (Do not list spouse as dependent)	SOCIAL SECURITY NUMBER	RELATIONSHIP (ex., son, daughter)	# MONTHS IN HOME IN 200X	DATE OF BIRTH (Month, Day, Year)	S/D
_____	____-____-____	_____	_____	____/____/____	____
_____	____-____-____	_____	_____	____/____/____	____
_____	____-____-____	_____	_____	____/____/____	____
_____	____-____-____	_____	_____	____/____/____	____

*Enter "S" for student or "D" for disabled in far right column above if dependent over 18 and either a student or disabled*

# OF CHILDREN WHO LIVED WITH YOU FOR WHOM YOU CAN NOT CLAIM DEPENDENCY EXEMPTION DUE TO SEPARATION OR DIVORCE: \_\_\_\_\_ (concerns Qualifying Child Status for Earned Income Credit)

**CREDITS:** The child tax credit is as much as \$500 for each qualifying child who was under age 17 at the end of 200X.

**2441 CHILD AND DEPENDENT CARE EXPENSES:**

PROVIDER'S NAME	ADDRESS	SSN/EIN
_____	_____	_____
_____	_____	_____
_____	_____	_____

NUMBER OF QUALIFYING CHILDREN WHO WERE CARED FOR IN 200X: \_\_\_\_\_

IF MARRIED FILING JOINT RETURN AND YOU HAD CHILD AND DEPENDENT CARE EXPENSES, WAS YOUR SPOUSE A FULL-TIME STUDENT (5 MONTHS OR MORE) OR NOT ABLE TO CARE FOR HIM/HERSELF? YES NO

**8863 EDUCATION CREDITS:** If you (or dependent) paid expenses in 200X for yourself, your spouse, or dependent to enroll in or attend the first 2 years of post-secondary education, you may be able to take the Hope Credit. Other students may qualify for Lifetime Learning Credit. To claim credit, attach form(s) 1098-T, list expenses paid \$ \_\_\_\_\_ & circle: Hope Lifetime

**ST PUT ANY OTHER STATE-SPECIFIC CREDITS HERE, SUCH AS THE HAWAII CREDIT FOR PURCHASING A CHILD PASSENGER RESTRAINT SYSTEM.**

**A CHARITABLE CONTRIBUTIONS:** Provide preparer with totaled cash/check & non-cash/check gifts to charity.

**8379 OFFSET:** If married filing joint return, is one spouse obligated to pay federal debt or past due child/spousal support which the IRS may seek to offset against the refund? YES NO

**5 ESTIMATED PAYMENTS** DID YOU MAKE ANY ESTIMATED PAYMENTS? YES NO If yes, total: \_\_\_\_\_

**Thank you for using the Fort Blank Electronic Tax Filing Center.  
Customer Satisfaction Surveys are available for any comments, complaints, or compliments.**

**Lower portion to be completed by tax center staff.**

System number: \_\_\_\_\_ Preparer's last name: \_\_\_\_\_