

EXTRA INFORMATION WORKSHEET

LAST NAME

FIRST NAME

MIDDLE

DID YOU OR A FAMILY MEMBER GO TO COLLEGE LAST YEAR? YES | NO

IF YOU ANSWERED YES, PLEASE ANSWER THE NEXT FEW QUESTIONS...

WHO WENT TO COLLEGE? YOU | YOUR SPOUSE | YOUR CHILD

TYPE OF TUITION PROGRAM COLLEGE (FIRST 4 YEARS) | COLLEGE (POST GRAD) | OTHER

DID THE STUDENT RECEIVE A 1098-T FROM THE SCHOOL? YES | NO

IF YOU ATTENDED A QUALIFIED EDUCATION PROVIDER, YOU WILL RECEIVE A 1098-T FOR TAX PURPOSES.

WAS THE STUDENT...

...Someone who completed first 4 years of college studies as of 01/01/2012? YES NO N/A

...Enrolled as a student during the previous year? YES NO N/A

...Enrolled in a program that leads to a degree or certificate? YES NO N/A

...Taking courses as part of a post high school education? YES NO N/A

...Taking courses to acquire or improve job skills? YES NO N/A

...Enrolled in full-time class schedule in the prior year? YES NO N/A

...Enrolled in half-time class schedule in the prior year? YES NO N/A

If you need to claim additional students on your tax return, please fill out additional forms. Thanks!

IF YOU SOLD INVESTMENT SECURITIES, PLEASE CONTACT YOUR BROKER

H1 TAX SERVICES CORP. DOES NOT PROVIDE GAIN/LOSS AND INVESTMENT HOLDING PERIOD CALCULATION SERVICES.

TO YOUR BENEFIT, THE IRS HAS MANDATED THAT YOUR INVESTMENT BROKER (FIDELITY, E-TRADE, SCHWAB, ETC.) PROVIDE YOU DETAILED AND SPECIFIC INFORMATION TO HELP YOU FILE YOUR TAX RETURNS. BEFORE SUBMITTING YOUR TAX DOCUMENTS TO US, PLEASE TAKE A MOMENT TO LOG IN TO YOUR BROKERAGE ACCOUNT WEBSITE AND MAKE SURE YOU CAN PROVIDE US THE FOLLOWING DOCUMENTS:

- 1. CONSOLIDATED GAIN/LOSS STATEMENT FOR THE PREVIOUS YEAR**
 - This statement will provide your true capital profit/loss from all qualified transactions
 - Long-term transactions have holding periods of 366 days or more and are taxed differently
- 2. YOUR COMPLETE 1099-STATEMENT FROM YOUR BROKER**
 - This statement will summarize any margin interest and dividends paid to you.

IF YOU CHANGED JOBS, ROLLED OVER A 401(k), WITHDREW MONEY FROM A RETIREMENT ACCOUNT OR SIMILAR...

YOU MAY HAVE OR WILL RECEIVE A FORM 1099-R FROM THE INSTITUTION THAT HELPED MANAGED YOUR RETIREMENT ACCOUNT. PLEASE BE PREPARED TO PROVIDE US COPIES OF ANY RELATED PAPERWORK TO MAKE SURE WE CAN APPLY FOR ANY POSSIBLE CREDITS AND AVOID ANY WITHDRAWAL PENALTIES IF POSSIBLE.

IF YOU PAID OR RECEIVED ALIMONY LAST YEAR...

PLEASE NOTE THAT THOSE WHO RECEIVE SUCH PAYMENTS MAY BE SUBJECT TO INCREASED TAXES AND THOSE WHO MADE SUCH PAYMENTS MAY BE SUBJECT TO REDUCED TAXES. WE WILL REQUIRED ADDITIONAL INFORMATION, INCLUDING:

- 1. IF YOU PAID ALIMONY...**
 - We will need the name and SSN of your former spouse
 - We will also need proof that you made your alimony payments
- 2. IF YOU RECEIVED ALIMONY...**
 - You must report these payments, as your former spouse will report these payments on his/her tax return.