Business Accounting & Tax Professionals 2023 Personal Income Tax Organizer

Please complete and return to us at any of our offices located in Fox Point, Oconomowoc or Pewaukee. To ensure a timely return, please complete as soon as possible. Information received after March 31, 2024 will be automatically extended and an additional charge will apply.

Contact I	<u>nformation</u>								
Name					Phone				
Email					Best Time	to Call			
	If you are a return	ing client and you have any chai	•			• .	ease check	k the box.	If you
FILING STA	ATUS: Single Minge in Filing Status? Pleas	farried Filing Joint e Explain:	Married F	iling Separate	Head of Ho	ousehold	Qualifying W	idow(er)	
Taxpaye	er			Spouse					
Soc Sec	、 #			Soc Sec#	<u> </u>				
Date of l	Bi <u>rth</u>			Date of Bi	rth				
Occupat	tion			Occupation	n				
Date of	Death (if applicable)				eath (if appl	icable)			
Do you v	wish to designate \$3	to the Presidenti	al Camp	aign Fund?	□ Тахра	yer 📮	Spouse		
Can you	ı be claimed as a De	pendent on some	eone els	e's return?	□ Тахра	yer 🗖	Spouse		
	Street		Apt #	City / Villa	age / Town	•	State	-	Zip
Moved Fr	County change your State com State			nship/School D Moved	ToState		/2: Date	3 es	/23
Dependent	ıs	1				# of months	% of S	Support	Check Box
	Full Name	Social Secur	rity #	Date of Birth	Relationship	Lived in Home	by You	by Others	If Legally Blin
	have Dependents wl				No				t(s) who file
Do you v	wish to have your re If Yes, you must att	,		o your perso		ccount? ct Deposit In	☐ Yes	☐ No same as la	st year.
Did you	receive an Identity F			epartment of	Revenue?		☐ Yes	☐ No	

Check all questions and provide documentation for all questions answered 'Yes'. Attach additional sheets if necessary.

Step 1 - Estimated Payments Made

	heck	box if	this	section	not	apı	olicat	ole
--	------	--------	------	---------	-----	-----	--------	-----

	Fed	eral	Sta	ite
	Amount Paid	Date Paid	Amount Paid	Date Paid
First Quarter				
Second Quarter				
Third Quarter				
Fourth Quarter				

Ster	2 -	Income & Retirement	☐ Check box if this section no	t applicable.		
Yes	<u>No</u>					
0	0	W-2 Income Taxpayer	# of W-2's	Spouse	# of W-2's	
0	0	Dividend and Interest Income	Provide statements and any 1099			r interest not reported on Form
			1099 on a separate sheet.			
0	0	Sale of Stocks or Bonds	Provide year-end statements and	1099-B. List any s	sales not reported o	n 1099 on a separate sheet.
0	0	Did you receive, sell, send, excha	nge, or otherwise acquire any f	nancial interest i	n any virtual Curre	ency? Provide details.
0	0	Did you pay or receive any Alimo	ny? 🔲 Paid 🔲 Red	eived	Date of Divorce:	
		Name	Social Security	#		Amount \$
0	0	Did you receive unemployment co	ompensation? Provide 10	99-G.		
0	0	Did you engage in any bartering	ransactions? Provide 10	99-B.		
0	0	Did you receive punitive damage	or awards for other than physic	cal injuries or illne	ess? Provide lega	I documents.
0	0	Did you have income from the lot	ery or other Gambling Income?	Provide W2-G.	Report Losses in Ite	emized Deductions Section.
0	0	Did you have any debt forgiven, r	nortgage foreclosure or abando	nment of propert	y? Provide 1099	9-A or 1099-C statement.
0	0	Did you receive distributions from	long-term contracts or Straddle	s?		
0	0	Did you receive any grant income	? Pleas	e explain & Provid	e name of Grant Pro	ogram.
0	0	Did you have any other miscellan	eous income not listed above?			
		Description		\$		_
		Description				
0	0	Did you receive any Disability Inc				
0	0	Did you make any withdrawals or qualified retirement plan? (If this	distributions from an IRA, Roth is for a qualified disaster, you n	IRA,401(k), Keo nust provide deta	gh, SIMPLE, SEP, <mark>ils)</mark> .	or other Provide 1099-R forms.
0	0	If Yes, were the proceeds rolled i	nto another retirement plan with	in 60 days?		
0	0	Did you make any Qualified Char	table Distributions with your IRA	A distributions?	Amount \$	
0	0	Did you or your spouse turn age retirement account?	73 during the year and <u>not</u> take	the required min	imum distributions	from your IRA or other
0	0	Did you receive Social Security b	enefits? Provide 1099-SSA sta	tement.		
0	0	Did you, or will you, contribute to	an IRA or Roth IRA? (excluding	employer plans)		
			Include statements from IRA and		trators	
		Trad	tional IRA		Roth IRA	
			Deductible Non-Deduction	ible		
		Taxpayer \$		Taxpayer \$		_
_	_	Spouse \$		Spouse \$		_
0	0	Did you convert any IRA proceed				
0	0	Did you have any self-employed	ousiness income and expense?	If Yes, complete	Self-Employment	Worksheet.
0	0	Did you have any Farm or Farm I	Rental income or loss?	If Yes, complete	Farm or Farm Rer	ntal Worksheet.
0	0	Did you have any Rental Income	or expenses?	If Yes, complete	Rental Worksheet	· -
0	0	Did you have any Partnership or	S-Corporation income?	# of	K-1's	
0	0	Did you have any Estate or Trust	income?	# of	K-1's	

ck a	all questions and provide of	documentation for all qu	uestions a	answered 'Yes'.			
<u>No</u>							
0	Did you sell your personal resid	dence?	F	Provide closing settleme	ent statement	and 1099	-S if provided.
0	Did you sell any real estate or p	personal property?	F	Provide closing settleme	ent statement	or other o	documentation.
0	Did you have income from an in	nstallment sale?	F	Please provide details.			
3 -	Foreign Income & Assets	☐ Check box if this	section not	applicable.			
0	Did you have foreign assets that	at exceeded \$10,000 at any ti	me during th	ne year?			
		(Including but not limited to	bank account	s & entity interests)			
_	•						
O		ndeclared Offshore Income?					
	• —						
<u> 4 -</u>	<u>Adjustments</u>	☐ Check box if this section no	t applicable	1.			
0	Were you on active duty and m	loved because of a military or	der? Dis	tance from old house to	old job	:	new job:
	Transportation & Storage	Expense	Tra	avel & Lodging Expense		_	
0	Were you a grade K-12 teache	r? If Yes, enter amount of	of out-of-pock	ket costs you paid:		\$	
<u> 5 -</u>	<u>Education</u>	Check box if this section no	t applicable	÷.			
0	Did you incur and pay any Stud	lent Loan interest?	Provide 109	98-E.			
0	Did you have any Higher Educa	ation expenses for you or a de	ependent?	Provide 1098-T. Credit	will NOT be a	llowed wit	thout 1098-T.
	Student Name	Year in College (1st, 2nd, 3rd, 4th, etc.)	State College Is In	Enrollment Status (full time, half time, less than1/2)	(books, sup	Additional oplies, compu	
0	Did you receive any proceeds f	rom a Section 529 Qualified 1	Γuition or Se	ection 530 College Sa	vings Plan?	Provide	1099-Q and detail
	what proceeds were used for:						
0	Did you make any contributions	s to a WI college savings acco	ount? I	f Yes, fill in the informa	tion below for	each stud	dent.
	☐ Tomorrow's Scholar	□ WI EdVest		☐ Tomorrow's	s Scholar		WI EdVest
	Name	SS #		Name		SS #	
_	Amount \$		ֈ ∟			_	
0	Would you like us to provide yo	ou with a FAFSA Statement fro	om your tax	information?	Per	rsonal info	ormation not included.
<u>6 -</u>	Itemized Deductions	☐ Check box if this	section not	applicable.			
0	Did you have any unreimburse	ed out of pocket medical expe	enses?	Exclude FSA, HSA, and M	ISA reimbursed	l amounts	from figures below
	Medical/Dental Bills \$	<u> </u>	F	Prescription Medicine, [Orugs & Insulir	า \$	
	Health Insurance Premiums	Taxpayer \$	_				
	Treath modrance i remains	Spouse \$		Medical Miles Driven			_ miles
	ouppromontal modicare	Taxpayer \$	_	Other medical expenses	s (please spec	cify)	
	Insurance Premiums	Spouse \$			_	\$	
	Long-Term Care Insurance	Taxpayer \$			_	\$	
		Spouse \$	_			\$	
_					nay be limited	1)	
0	Did you pay real estate taxes?	•					Provide tax bill.
0	Dil		ome, cabin, e	etc.) Provide Rentals on	Rental Form		Provide tax bill.
\circ	טום you pay mortgage interest?	·		ata) Duardido Daretal	Dantal Fra		Provide 1098.
	NO O O O O O O O O	Did you sell your personal resider of proceeds and pay any Student Name Did you have any Foreign or understand or proceeds were used for: Did you have any Foreign or understand or proceeds were used for: Did you have any Foreign or understand or proceeds were used for: Did you make any contributions Tomorrow's Scholar Name Amount \$ Would you like us to provide your point of the standard proceeds were used for: Did you make any unreimburse wheat proceeds were used for: Did you make any contributions Tomorrow's Scholar Name Amount \$ Would you like us to provide your point your proceeds and provide your proceeds were used for: Did you make any unreimburse wheat proceeds were used for: Did you make any contributions Tomorrow's Scholar Name Amount \$ Would you like us to provide your point your proceeds were used for: Did you have any unreimburse wheat proceeds were used for: Did you pay like us to provide your point your proceeds were used for: Did you pay like us to provide your point your proceeds were used for: Did you pay like us to provide your point your proceeds were used for: Did you pay like us to provide your point your proceeds were used for: Did you pay like us to provide your point your proceeds were used for: Did you pay like us to provide your point your proceeds were used for: Did you pay like us to provide your proceeds were used for: Did you pay like us to provide your proceeds were used for: Did you proceeds were used for: Note that your proceeds were used for: Note that your proceeds were used for: Did you proceeds were used for: Note that your proceeds were used for: Did you proceeds were used for: Did you proceeds were used for: Note that your proceeds were used for: Did you proceeds were used for: Did your proceeds were used for: Did you proceeds were used for: Did your proceeds were used for: Did you proceeds were used for:	Did you sell your personal residence? Did you sell any real estate or personal property? Did you have income from an installment sale? Did you have income & Assets Did you have foreign assets that exceeded \$10,000 at any ti (Including but not limited to Please explain: Did you have any Foreign or undeclared Offshore Income? Please explain: Did you have any Foreign or undeclared Offshore Income? Please explain: Did 4 - Adjustments Check box if this section not ransportation & Storage Expense Were you on active duty and moved because of a military or Transportation & Storage Expense Were you a grade K-12 teacher? If Yes, enter amount of this section not you income any student Loan interest? Did you incur and pay any Student Loan interest? Did you have any Higher Education expenses for you or a de Year in College Student Name (1st, 2nd, 3rd, 4th, etc.) Did you make any contributions to a WI college savings according to the provide you with a FAFSA Statement for the provide you with a FAF	Did you sell your personal residence? Did you sell any real estate or personal property? Did you have income from an installment sale? Did you have income & Assets Check box if this section not (Including but not limited to bank account Please explain: Did you have any Foreign or undeclared Offshore Income? Please explain: Check box if this section not applicable Were you on active duty and moved because of a military order? Were you a grade K-12 teacher? Check box if this section not applicable Transportation & Storage Expense Tree Were you a grade K-12 teacher? Check box if this section not applicable Did you incur and pay any Student Loan interest? Provide 109 Did you have any Higher Education expenses for you or a dependent? Did you have any Higher Education expenses for you or a dependent? Did you receive any proceeds from a Section 529 Qualified Tuition or Security (Int. 2nd. 3nd. 4m. etc.) Did you make any contributions to a WI college savings account? Tomorrow's Scholar Wiledvest Name SS# Amount \$ Would you like us to provide you with a FAFSA Statement from your tax Po 6 - Itemized Deductions Did you have any unreimbursed out of pocket medical expenses? Medical/Dental Bills Taxpayer \$ Supplemental Medicare Insurance Premiums Spouse \$ Taxpayer \$ Spouse \$ Taxpayer \$ Spouse \$ Check box if this section not applicable to the provide you with a FAFSA Statement from your tax Taxpayer \$ Supplemental Medicare Taxpayer \$ Spouse \$ Taxpayer \$ Spouse \$ Check box if this section for the provide you with a FAFSA Statement from your tax Taxpayer \$ Spouse \$ Check box if this section for Security the provide you with a FAFSA Statement from your tax Taxpayer \$ Spouse \$ Check box if this section for Security the provide you with a FAFSA Statement from your tax Taxpayer \$ Spouse \$ Check box if this section for Security the provide you with a FAFSA Statement from your tax Taxpayer \$ Spouse \$ Check box if this section not applicable the provide you with a FAFSA Statement	Did you sell your personal residence? Did you sell any real estate or personal property? Did you have income from an installment sale? Did you have income from an installment sale? Did you have foreign assets that exceeded \$10,000 at any time during the year? (Including but not limited to bank accounts & entity interests) Please explain: Did you have any Foreign or undeclared Offshore Income? Please explain: Did you have any Foreign or undeclared Offshore Income? Please explain: Did you have any Foreign or undeclared Offshore Income? Please explain: Did you nactive duty and moved because of a military order? Distance from old house to Travel & Lodging Expense Were you a grade K-12 teacher? If Yes, enter amount of out-of-pocket costs you paid: Did you incur and pay any Student Loan Interest? Did you incur and pay any Student Loan Interest? Did you have any Higher Education expenses for you dependent? Provide 1098-E. Did you have any Higher Education expenses for you dependent? Provide 1098-E. Did you receive any proceeds from a Section 529 Qualified Tuition or Section 530 College Sa what proceeds were used for: Did you make any contributions to a WI college savings account? Tomorrow's Scholar WI EdVest Name SS # Amount \$ Tomorrow's Scholar Obeket medical expenses? Medical/Dental Bills S Prescription Medicine, E Provide 1098-E Prescription Medicine, E Primary Residence (less special assessments) Other (second home, cabin, etc.) Provide Rentals on Other (second home, cabin, etc.) Provide Rentals on Other (second home, cabin, etc.) Provide Rentals on Other Primary Residence	No Did you sell your personal residence?	No Did you sell your personal residence?

Che	ck a	III questions and provide d	locumentation	for all question	ns ansv	wered 'Yes'.		
Yes	No							
0	0	Did you pay home equity loan in		Primary Residen		\$	_	
O	O	Were all home equity funds use	•			If No, enter amount used for other p	urposes:	
		Description				<u> </u>		
			Note: You Must pro	ovide Name, Address	& SSN if	f interest was paid to an individual)	_	
0	0	Did you pay loan origination fee	•					
		\$ Da	te of refinance			Length of loan		
0	0	Did you pay any investment inte	erest? \$					
0	0	Did you make any charitable co	ntributions?	Monetary Donations	s under \$	\$250 each must be substantiated by either	(1) a bank	record or
		(2) a written receipt from the	,	s name and the date ain a written acknowl		ount. For donations of \$250 or more each, t from the charity.	the taxpay	er must
		List to Whom Contributed	<u>Monetary</u>	<u>Property</u>	<u> </u>	Amount or Fair Market Value	Receipts	
					\$		Yes 🗆	l No
					\$		Yes 🗆	l No
					\$		Yes 🗔	l No
					\$		Yes 🗔	l No
					c		Yes 🗆	No
					\$		Yes 🗆	No
		Miles driven for charitable purpo	oses:	# of miles				
0	0	Did you have any casualty losse	es? \$		Descrip	otion:		
0	0	Did you incur any Gambling Los	ses during the ye	ear?	federal tax	\$ purposes, the State of WI does not allow any dedu	ctions)	
0	0					ing artist, or fee-based Gov't official? \$		
Ster	7 -	Healthcare ☐ Check box	if this section no	t applicable				
<u> </u>						former family 0		4005.4
0		Did you have health insurance t	_		•		rovide form	
O	O	(DO NOT include amounts deducted p				a Health Savings Account or Medical Sa ria Plan)	avings Ac	count?
				Spou		•		
		Type of Health Plan Coverage	Self-only	 ,				
0	0	Did you take any distributions from	om a Health Savi	ngs Account or Med	dical Sav	vings Account? Provide form 1099-SA		
		Amount of distribution \$		_		ns used for Qualified Medical Expenses	? 🔲 Yes	□ No
Ster	8 -	Taxes ☐ Check box	if this section no	t applicable.				
$\overline{}$	\cap	 Did you receive Tip Income not			w much	n ¢		
0	0							# 0 F 000
0	0	_			-	24 have unearned (non-W2 income) inc	ome over	\$2,500?
O	O	Did you pay any individual \$2,60	•			(e.g. babysitter, caretal	ker)	
		If yes, have you filed wa	ge tax returns?	☐ Yes ☐ No				
Step	9 -	Credits	if this section no	t applicable.				
0	0	Did you install energy efficient p	roperty (geothern	nal heat pump, sma	ıll wind e	energy, solar electric) on any of your r e	esidence	s ?
						\$		
\sim	\sim	Date Installed		Descrip			unt Paid	_
O	O	טום you make energy efficient ir	nprovements (ins	ulation, doors, wind	iows, en	nergy audit) in your primary residence) (
		Date Installed		Descrip	tion		unt Paid	_
0	0		nt expenditures (A	•		boiler, electrical) on any of your reside	ences?	
					e:	\$		_
		Date Installed		Descrip	แบบ	Amou	unt Paid	

Check all questions and provide documentation for all questions answered 'Yes'.

(Note: Total amounts paid to provider must equal total amounts of all children.) Did you have expenses associated with adopting a child? Did you purchase a new or used fuel cell or electric plug-in whelice? If Yes, provide all details of vehicle purchase. Did you install an electronic vehicle charging station? If Yes, include costs of station and installation. Did you use gas or special fuels in off-road vehicles for business or farm use? Check box if this section not applicable. Did you purchase items out of state with No Sales Tax paid? If Yes, list purchase amount Do you want to donate to any of the following? Cancer Research Endangered Resources Second Harvest/Feeding America Military Family Relief Special Olympics WI Multiple Scierosis Veterans Trust Fund Did you pay for a Dependent(s) to attend a private school? If yes, complete the information below for each student. School Information: Name & Address SSN or EIN Name School Attended Grade Amount Paid Name School Attended Grade Amount Paid Name School Attended Did you pay rent for housing? Heat included \$ Name School Attended Grade Amount Paid Plat included \$ Name Incl	Yes	No	If you and your angues wer	rkad ar wara l	looking for work, die	l vou bovo	any shild s	oro ovnoncoo?	lf v	vos provido	statoments	
Provider Information: Name & Address SSN or EIN Amount Paid	O	O										
Name & Address Name & Address SSN or EIN SAmount Paid				perident dare	, beliefit i Togram w	ntii your ci	ripioyer:	— 165 —	a NO			
Name & Address SSN or EIN			Trovider information.						\$			
Name & Address SSN or EIN Amount Paid Child Information: Name Samount Paid Name Samount Paid Name Na			Nam						Ψ	Amount Pa	aid	
Child Information: Name									\$			
Name Name Name Name Name Name Name Name				e & Address			SSN	or EIN		Amount Pa	aid	
Name Amount Paid Name Amount Paid Name Amount Paid Name (Note: Total amounts paid to provider must equal total amounts of all children. Amount Paid Name (Note: Total amounts paid to provider must equal total amounts of all children. Did you have expenses associated with adopting a child? \$ Did you purchase a new or used fuel cell or electric plug-in vehicle? If Yes, provide all details of vehicle purchase. Did you install an electronic vehicle charging station? If Yes, include costs of station and installation. Did you use gas or special fuels in off-road vehicles for business or farm use? Step 10 - State Adjustments			Child Information:									
Name						_				\$		
(Note: Total amounts paid to provider must equal total amounts of all children.) ○ Did you have expenses associated with adopting a child? ○ Did you purchase a new or used fuel cell or electric plug-in vehicle? ○ Did you install an electronic vehicle charging station? ○ Did you use gas or special fuels in off-road vehicles for business or farm use? Step 10 - State Adjustments ○ Did you purchase items out of state with No Sales Tax paid? If Yes, list purchase amount ○ Did you want to donate to any of the following? Cancer Research Endangered Resources ③ Red Cross WI Disaster Relief Endangered Resources ⑤ Second Harvest/Feeding America ⑤ Did you pay for a Dependent(s) to attend a private school? If yes, complete the information below for each student. School Information: Name School Attended Grade Amount Paid Heat not included \$ Did you pay rent for housing? Heat included \$ Did you receive child support (for WI Homestead credit only)? Step 11 - Miscellaneous ○ Did you make gifts of more than \$17,000 to any individual?			Name			_				\$	Amount Pa	
O Did you have expenses associated with adopting a child? O Did you purchase a new or used fuel cell or electric plug-in vehicle? Did you purchase a new or used fuel cell or electric plug-in vehicle? If Yes, include costs of station and installation. Did you use gas or special fuels in off-road vehicles for business or farm use? Step 10 - State Adjustments			Name	(Note: Tot		ovider mus	t equal total:		ildren		Amount Pa	
O Did you purchase a new or used fuel cell or electric plug-in vehicle? If Yes, provide all details of vehicle purchase. O Did you install an electronic vehicle charging station? If Yes, include costs of station and installation. O Did you use gas or special fuels in off-road vehicles for business or farm use? It Yes, include costs of station and installation.	\sim	\sim	D: 1			Ovider mas	t oqual total		iidi Oii.			
O Did you install an electronic vehicle charging station? If Yes, include costs of station and installation. O Did you use gas or special fuels in off-road vehicles for business or farm use? Check box if this section not applicable.	\circ	0	•					·				
O Did you use gas or special fuels in off-road vehicles for business or farm use? Check box if this section not applicable.	\circ	0	•							urchase.		
Check box if this section not applicable.	O	O	•					of station and ins	allation.			
O Did you purchase items out of state with No Sales Tax paid? If Yes, list purchase amount O Do you want to donate to any of the following? Cancer Research Endangered Resources Second Harvest/Feeding America Military Family Relief Multiple Sclerosis Veterans Trust Fund Similary Family Relief School Information below for each student. School Information: Name & Address SSN or EIN Name School Attended Grade Amount Paid Similary Family Relief Section Information: Name School Attended Grade Amount Paid Shame Did you pay rent for housing? Heat included Shamount Paid School Attended Did you receive child support (for WI Homestead credit only)? Step 11 - Miscellaneous O Did you make gifts of more than \$17,000 to any individual?	0	0	Did you use gas or special	fuels in off-ro	oad vehicles for bus	iness or fa	rm use?					
O Did you purchase items out of state with No Sales Tax paid? If Yes, list purchase amount O Do you want to donate to any of the following? Cancer Research Endangered Resources Second Harvest/Feeding America Military Family Relief Multiple Sclerosis Veterans Trust Fund Similary Family Relief School Information below for each student. School Information: Name & Address SSN or EIN Name School Attended Grade Amount Paid Similary Family Relief Section Information: Name School Attended Grade Amount Paid Shame Did you pay rent for housing? Heat included Shamount Paid School Attended Did you receive child support (for WI Homestead credit only)? Step 11 - Miscellaneous O Did you make gifts of more than \$17,000 to any individual?	Ster	10	- State Adjustments	☐ Check	box if this section r	not applica	ıble.					
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Cancer Research Endangered Resources Second Harvest/Feeding America Silitary Family Relief Special Olympics WI Special Olympics WI Sultiple Sclerosis Veterans Trust Fund Silitary Family Relief Special Olympics WI Silitary Family Relief Special Olympics WI Silitary Family Relief Special Olympics WI Special	\sim	0										
Endangered Resources \$ Second Harvest/Feeding America \$ Military Family Relief \$ Special Olympics WI \$ Multiple Sclerosis \$ Veterans Trust Fund \$	O	O	Do you want to donate to a		owing?							
Military Family Relief Multiple Sclerosis Veterans Trust Fund S Did you pay for a Dependent(s) to attend a private school? If yes, complete the information below for each student. School Information: Name & Address SSN or EIN			Cancer Research	-		Red Cros	ss WI Disast	er Relief	· ·			
Multiple Sclerosis Did you pay for a Dependent(s) to attend a private school? If yes, complete the information below for each student. School Information: Name & Address SSN or EIN Name Name School Attended Grade Amount Paid Name School Attended Grade Amount Paid Name School Attended Grade Name School Attended Grade Name School Attended Grade Amount Paid Heat not included \$ Did you pay rent for housing? Heat included \$ Did you receive child support (for WI Homestead credit only)? Step 11 - Miscellaneous Check box if this section not applicable. O Did you make gifts of more than \$17,000 to any individual?			Endangered Resources			Second Harvest/Feedi		ding America	<u>\$</u>			
Did you pay for a Dependent(s) to attend a private school? Name & Address SSN or EIN			Military Family Relief			Special Olympics WI			\$	\$		
School Information: Name & Address SSN or EIN			Multiple Sclerosis	\$		Veterans	Trust Fund		\$			
Name & Address Student Information: Name	0	0	Did you pay for a Dependent(s) to attend a private school? If yes, complete the information below for each student.									
Name & Address Student Information: Name			School Information:									
Name & Address Student Information: Name								_				
Student Information: Name				Name &	Address					SSN or El	N	
Student Information: Name				Name &	Address			_		SSN or El	N.	
Name School Attended Grade Amount Paid \$ Name School Attended Grade Amount Paid \$ Name School Attended Grade Amount Paid \$ Did you pay rent for housing? Heat included \$ Did you receive child support (for WI Homestead credit only)? Step 11 - Miscellaneous Check box if this section not applicable. O Did you make gifts of more than \$17,000 to any individual?			Student Information:	Name a	Marcos					OON OF E		
Name School Attended Grade Amount Paid \$ Name School Attended Grade Amount Paid \$ Name School Attended Grade Amount Paid \$ Did you pay rent for housing? Heat included \$ Did you receive child support (for WI Homestead credit only)? Step 11 - Miscellaneous Check box if this section not applicable.									\$			
Name School Attended School At			Name		School Attended		Grade		<u> </u>	Amount Pa	aid	
Name School Attended Grade Amount Paid Did you pay rent for housing? Heat included \$ Heat not included \$ Did you receive child support (for WI Homestead credit only)? Step 11 - Miscellaneous Check box if this section not applicable. Were you notified by the IRS or State of any changes in your prior years tax returns? If yes, provide correspondence. Did you make gifts of more than \$17,000 to any individual?									\$			
Name School Attended Grade Amount Paid Did you pay rent for housing? Heat included \$ Heat not included \$ Did you receive child support (for WI Homestead credit only)? Step 11 - Miscellaneous Check box if this section not applicable. Were you notified by the IRS or State of any changes in your prior years tax returns? Did you make gifts of more than \$17,000 to any individual?			Name		School Atten	nded	_	Grade		Amount Pa	aid	
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