

Background Information

This information will be used to determine your filing status. If you have recently married, be sure that your spouse has a social security number and, that if her name has been changed it is reflected on her social security card.

Taxpayer name: _____ Date of Birth: ____/____/____ Month/Date/Year

U.S. Social Security #: _____ - _____ - _____ Canadian Tax Identification #: _____ - _____ - _____
(only needed if filing a Canadian return)

Marital status: Single Married Divorced Is this a change from last year? Yes No

Spouse's name: _____ Date of Birth: ____/____/____ Month/Date/Year

U.S. Social Security #: _____ - _____ - _____ Canadian Tax Identification #: _____ - _____ - _____
(only needed if filing a Canadian return)

VISA

If you are an individual of a nationality other than American and are playing within the United States and/or have been issued any sort of Visa, it is critical to provide us with your Visa and Passport information.

Nationality: _____ Passport Number: _____

Visa Type: _____ Visa Number: _____

NEW: Driver's License Number _____

Issuing State _____ Date issued: ____/____/____ Expiration: ____/____/____

Permanent address: _____
House number & street

City State Postal Code

Cell phone: _____ E-mail: _____

Twitter: _____ How would you prefer us to contact you? _____

(in-season) school district: _____ (off-season) school district: _____

County where you work: _____ County where you live: _____

Please include your team itineraries with your documents

Dependents

All children must have a social security number or a tax identification number, if they don't please contact us for information about obtaining one.

Dependent's name	Birthdate	Social Security Number	Relationship
_____	___ / ___ / _____	_____	_____
_____	___ / ___ / _____	_____	_____
_____	___ / ___ / _____	_____	_____
_____	___ / ___ / _____	_____	_____

Child Care Expenses

A credit is allowed for all qualified child care expenses paid. You are only eligible if both parents work and your child is under the age of 13

Tax Tip
Please note that under certain circumstances girlfriends or other individuals who are without wages and who you support can be claimed as a dependent.

Name of child: _____

Care provider name: _____

SS # or Business ID #: _____

Care provider address: _____

City/State and postal code: _____

Dates care was provided: ___ / ___ / _____ to ___ / ___ / _____ total amount paid: _____

Important: Please provide separate information for each child's expenses that were paid and separate information for each child care provider used.

Higher Education Tuition and Interest

Tax credits are available for tuition and student loan interest incurred by students pursuing college or graduate degrees. The taxpayer, spouse or any of their dependents can incur these expenses. These deductions and credits are limited to your income level – however if you have paid tuition or student loan interest please include the amounts here and let me determine whether you qualify.

Name of student: _____ University or College: _____

Tuition paid (include 1098-T form): _____

Student loan interest paid (include 1098-E form): _____

United States & Canada Wages and Income

Please provide all wage slips (W2 in US and T4 in Canada)

Employer		W2 or T4 slip enclosed
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no

If you missed any US road games – list the dates and reason you didn't travel with team:

Signing Bonus or Miscellaneous Income

If you received payments for a signing bonus, appearances, card signings, coaching, educational clinics or camps, which were not included in your wage slip you still need to report this income. Failure to do so will result in penalty and interest to be added on to this amount later by the IRS. **This income will be reported on a 1099-Misc slip.**

Employer/Payer		1099-MISC enclosed	Amount
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____	Taxpayer/Spouse	<input type="checkbox"/> yes <input type="checkbox"/> no	_____

Foreign Income

If you played or earned income in Europe, Asia or South America this past year please indicate below and attach a wage slip with your documents. Please indicate, to your best knowledge the amount you earned with each team:

Employer/Team	Wage slip enclosed	Amount
_____	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____	<input type="checkbox"/> yes <input type="checkbox"/> no	_____

Investments

If you have a stock broker please inform them we may be calling for information on your account!

Name of Broker: _____ Telephone #: _____

Brokerage firms will send out 1099-B's (along with your 1009-Int/Div) and 'Realized Capital Gains Reports' by early February. Should you have this information please provide these forms. If you were not provided this information, and you sold stocks during the past year, please be sure to fill out the information below:

Name of the stock*: _____

Number of shares sold: _____ Date purchased: ___/___/___ Date sold: ___/___/___

*** If you had more than one stock sold please report all the information on an additional piece of paper and attach it to the questionnaire.**

Interest and Dividends

If you received interest or dividends from a bank account or brokerage firm, please indicate below all financial institutions in which you have investment income. All information will be reported on forms 1099-Int or 1099-Div in the US and T4 or T5 slips in Canada.

Bank or Firm	Slip enclosed	Amount
_____	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____	<input type="checkbox"/> yes <input type="checkbox"/> no	_____
_____	<input type="checkbox"/> yes <input type="checkbox"/> no	_____

Please note: If you have **not** received a form from your bank or brokerage firm, please indicate the amount of interest or dividends earned over the past year. By law every bank or financial institution that pays over \$10 in interest or dividends must supply you with a tax slip showing the amount of income you received by February 15th.

Foreign Bank Accounts

If you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account, please indicate so below. Although there may not be any tax implications we still need to report *each* account that exceeds \$10,000 during the year.

Bank Name and Address	Account number	Maximum Amount
_____	_____	_____ (Currency)
_____	_____	_____ (Currency)

Direct Deposit

Do you want your refunds directly deposited into your bank account yes no
 Do you want any balances owed directly withdrawn from your bank account yes no

IMPORTANT: If you answered yes to either of the above questions - **please include a voided check stapled to your questionnaire.** Note if you have a balance due and check yes to the above question I will notify you of the amount due prior to filing your taxes.

Deductions and Credits

Deductions lower your taxable income while credits lower your actual tax. All deductions and credits should be substantiated with receipts.

Property

If you own property and pay taxes, or have a mortgage, please fill out the following section. *If you **don't** own a house or pay property taxes on land or a house, please skip this section.*

Did you buy or sell your house over the past year? yes no

If you bought or sold your house over the past year please enclose a copy of your closing statement (HUD-1). If you sold your property, I'll also need a copy of the original closing statement from the purchase.

Taxes and Interest

You can deduct the taxes paid on your primary or vacation home as well as any interest paid on your home mortgage loan. **Should you have rental property please put that information on page 11.** *If you paid property taxes through an escrow account, this amount will be found on your year-end 1098 mortgage and interest statement.* If you did not pay your property taxes through an escrow account, you should have received a receipt from your town clerk for taxes paid during the past year.

Property address	Taxes	Interest paid	1098 Slip
_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

If you refinanced your home, you may be able to deduct the home equity loan interest paid over the following year as a deduction

Home equity loan interest: _____ (please enclose 1098MIS form)

Personal Property Tax

Personal property tax on your automobile is deductible if it is based only on the value of the automobile and is charged on a yearly basis.

Auto Registration Taxes: _____ State registered: _____ Please enclose your receipt

Auto Registration Taxes: _____ State registered: _____ Please enclose your receipt

Moving Expenses

If you remain with the same team - traveling back and forth to home after the season is **not** deductible as a moving expense.

Location of new team or first team: _____

Location of previous team, college/home: _____

Were you traded or did you sign with a new team during the year? yes no
 Did you pay out of your own pocket to move your items or travel? yes no

If you answered yes to **both** questions above, please indicate your expenses below:

Expenses	Amount	Receipts
Transportation, shipping and storage of household items:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Expenses of moving from old to new location:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Temporary housing or hotel: (amount) _____ or (days) _____		<input type="checkbox"/> yes <input type="checkbox"/> no
Automobile miles: _____		

Taxes Paid or Refunds

If you made estimated federal or state tax payments, please list them below. In addition - If we **did not** do your taxes last year and you made state tax payments at the deadline (separate from those listed on your W2)

For taxes paid or refunds if we did your taxes last year we have this information – you can skip this section and go to page 7

Estimated tax payments

Federal Amount: _____ Dates of Payments: _____

State: _____ Amount: _____ Dates of Payments: _____

Payments made at deadline with your return (if I did your taxes last year we have this information)

Please list all states and the amounts: _____

Refunds received

If you itemized your deductions last year – your state refunds unfortunately need to be claimed as income this year. If you received a refund last year and we did **not** do your taxes please indicate all refunds received below:

Please list all states in which refunds were received, the amount and include the 1099-Gs

State	Amount	1099-G Included
_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

Tax Tip

Organize your receipts into categories and put them into envelopes – total the receipts and write on the outside of the envelope the amount

Employee Business Expenses

IMPORTANT: To claim a business expense, you need to prove the expense was related to your occupation (business purpose) and prove that you paid it. All expenses should have a receipt and records indicating the purpose of the expense.

Expense	Amount	Receipts
Union dues	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Agent fees	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Trainer tips or fees	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Condition expense (personal trainer, gym or ice fees)	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Supplements	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Workout equipment or protective gear	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Clothing for training (business suits are not deductible)	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
League or team fines	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Investment advisor fees	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Tax preparation fees separate from agent fees	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Phone and postal expenses (business purpose)	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Promotional expenses (photo purchased)	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Subscription to NHL Center Ice or other publications	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Business related entertainment (business purpose)	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Game tickets (business purpose)	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

The IRS allows partial deductions on the cost of certain equipment which is used for both business and pleasure. If you purchased a television, computer, tablet or laptop for business purposes over the last year please indicate below:

Item: _____ Receipt: yes no

Cost: \$ _____

Approximately what percentage is used for business? _____%

Business Related Travel/Temporary Living

The IRS allows the following deductions for unreimbursed expenses while temporarily away from home:

- Transportation (airplane, bus, or train) _____ yes no
- Commuting away from home (taxi or car service) _____ yes no
- Parking and tolls _____ yes no
- Meals on the road (above per diem or team dinner) _____ yes no

If you spent time in a hotel (either while called up/down or while having been traded or training in the summer), you may claim any unreimbursed cost for hotel or meals.

Number of days in a hotel: _____ City: _____ Reason: _____

Automobile Expense

Important: Please include your team itineraries to help substantiate your deductions

Automobile purchased: ___ / ___ / _____ Total miles driven during year: _____

- | | Miles |
|---|-------|
| Travel to training camp | _____ |
| Travel home after season | _____ |
| Travel to instruct at camps | _____ |
| Drive to workout in summer (gym or arena) | _____ |
| Drive to skate in the summer | _____ |

Name of gym and address: _____

Name of the ice arena and location: _____

Drive to team's practice arena _____

Drive to airport for road trips _____

Drive to team functions or promotions _____

_____ (Total business miles)

Commuting Miles

Distance from home to game arena: _____ Total number of times driven to the game arena: _____

Tax Tip

Have your car serviced at the beginning and end of each year. The service invoice will help determine the total number of miles driven on your vehicle – should the IRS ever question your miles driven we can use the invoices to justify this amount

If you worked out or skated at more than one location please list all of them

Charitable Contributions

Contributions of money or property to a qualified organization are deductible. For contributions of over \$250 you need a receipt.

Organization	Donation	Amount	Receipt
_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

Charitable miles: _____

Medical Expenses

Medical expenses are amounts that are not paid by insurance or employer and they must exceed 10% of your income. **Unless you have a large amount of expenses or do not have health care through your employer you will probably not qualify for this deduction.**

Expense	Amount	Expense	Amount
Prescriptions	_____	Medicine	_____
Medication Insurance paid	_____	Eyeglasses, contacts or dentures	_____
Doctor or Dentist visits	_____	Lodging	_____
Hospital expenses	_____	Number of medical miles: _____	

Health Insurance

If you are a resident or a citizen of the US you will need to report your health insurance coverage. **Important:** If you bought insurance in the marketplace, you should have been issued a 1095-A. Please be sure to include that document.

Employee-provided health insurance coverage yes no

Name of employer: _____ Monthly payment: _____ (only if out of pocket)

Marketplace assigned policy issuer & number: _____ State: _____

Start date: ___/___/___ Termination date: ___/___/___ Monthly payment: _____

Other policy issuer & number: _____

Start date: ___/___/___ Termination date: ___/___/___

1095 (A,B or C) included: yes no

Over the past year were you insured: all 12 months - if not list months w/o coverage: _____

Small Business Revenue and Expense

If you have a financial interest in a business or partnership please attach all K-1 forms that you received

Partnership	Description	K-1 slip enclosed
_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

Sole Proprietorship

If you or your spouse own a small business your income from this business will need to be reported. You report net profits or loss for the year on a schedule C and it becomes part of your adjusted gross income. A net loss from the business can lower your adjusted gross income.

Name of Business: _____ Business ID #: _____

Income from sales: _____

Expenses	Amount	Receipts
Cost of goods sold:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Office expense:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Advertising:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Contracted labor (see below):	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Insurance:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Equipment:	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

Please note if you paid an individual over \$600 for contracted labor – please notify us as you are obligated under law to issue them a 1099-Misc prior to January 31st.

Automobile Expense

Total miles driven during the year: _____ Business miles: _____

Home Office Expense

If you or your spouse have a home office you can take a percentage of all your expenses paid for your home or apartment.

Total square footage of house/apartment: _____ Area used exclusively for business: _____

House utilities: _____ Repairs/maintenance: _____

Rental Real Estate

This form is only for taxpayers that own rental real estate. If you own real estate with partners and are supplied tax inform, please attach it to this form. If you own more than one property, please prepare one sheet for each property. *If you **do not** own rental real estate, please skip this page.*

Kind of property: HOUSE CONDO/APARTMENT OTHER

Property address: _____

Purchase date: ___ / ___ / ____ Date sold (if sold): ___ / ___ / ____

Original cost: _____ Capital Improvements: _____

Are you the sole owner: yes no if no, who else owns the property? _____

If you lived in the property at all during the year please list those dates: _____

Total rents collected this year: _____

Expense	Amount	Receipts
Advertising	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Auto & Travel	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Cleaning & Maintenance	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Commissions	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Insurance	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Legal fees	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Management fees	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Mortgage interest paid to banks	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Other interest	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Repairs	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Supplies	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Taxes	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Utilities	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Wages & Salaries	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
Other	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

Retirement Contributions

Traditional IRA

Does your employer offer a retirement plan (box 13 on W2) yes no

If your employer offered a retirement plan you will not receive any benefit from contributing to a traditional IRA – however there are exceptions based on your income level. **If you are interested in learning if you qualify please feel free to ask.**

Traditional IRA's provide two benefits:

- They reduce your current tax liability
- They provide funds for your retirement

Amount to contribute: _____ (you must make this prior to April 15th)

The tax savings for a Traditional IRA are immediate. Any contribution you make will lower your taxable income by your tax rate. Therefore, if your tax rate is 25% you will save \$250 for every \$1,000 you contribute

Roth IRA

If your employer offers a retirement plan and your total household income is less than \$199,000 (married) or \$135,000 (single) you may contribute to a Roth IRA. However, there is a legal backdoor way to contribute to a ROTH IRA even if your income is higher than the limits – **please notify us if you're interested in finding out how.**

Amount to contribute: _____ (you must do this prior to April 15th)

There are no immediate tax savings on a Roth IRA – however when you withdraw your money later in life you will not have to pay tax on that money plus any interest that has been earned on that money. Therefore, if you contribute \$1,000 and that money grows to \$5,000 over the next 30 years you will not have to pay tax on the \$5,000 when you withdraw it.

RRSP

This only applies if you filed a Canadian tax return.

RRSP's are tax deferred savings plans for your retirement (like a traditional IRA). RRSP contributions are different for each individual and are determined by your income. If you are interested in making a RRSP contribution you need to make it prior to the February 28th deadline.

Yes I'm interested please call me

Amount to contribute: _____