

24. ESA / QTP Withdrawal
Tuition and Housing Total \$ _____
Withdrawal Amount \$ _____
Housing Amount cannot exceed School Dormitory
cost or School Cost of Living Estimate

Child Care:
Number of Dependents cared for: _____
Person or Organization Paid: _____
Address: _____
SSN or Federal ID# (Required) _____

Alimony:
Paid: \$ _____
Received: \$ _____
SSN of Ex-Spouse _____

Employee Business Travel:
Meals \$ _____
Air Fares \$ _____
Number of Overnight Stays: _____
Parking \$ _____
Reimbursement from employer
not included in W-2 \$ _____
Incidentals (Taxi, Dry Cleaning, Etc) \$ _____

Purchased and/or refinanced Personal Residence or Income Property.
Please bring in the **property tax bill** and the **Escrow Closing Statement**.

Sold Personal Residence or Income Property.
Please bring in the **property tax bill** and the **Escrow Closing Statement** and **Form 1099-S**

Sale of Stock, Securities, or Bitcoins.
Please bring in the **Settlement Statements of Sale & Purchase** and **Form 1099-B**.

Did you have debt cancellation or foreclosure?
Date _____
Amount \$ _____

Bring your last loan statement
and Form 1099A or Form 1099C

College Education:
Tuition & Fees Paid \$ _____
Books \$ _____
Was student half time or more? Yes / No
Does student have a felony drug conviction? Yes / No

25. Foreign Financial Asset Reporting:
Do you own/have interest in any Foreign Account?
Yes / No
If yes, please bring the Asset or Account Info:
Name, Address, Account Number, and Balance

Do you have an Online Gambling Account?
Yes / No
Foreign gifts totaling over \$100,000.00 from an
Individual or \$15,601.00 from a business entity?
Yes / No

Amount paid for each child: \$ _____
Phone Number (required)
City: _____ St: _____ Zip: _____
Did you receive dependent childcare benefits?
Yes / No

Employee Business Auto Expense:
Total Miles _____
Business Miles _____
Personal Miles _____
Gas \$ _____
Repairs \$ _____
Tires \$ _____
Vehicle Insurance \$ _____
Misc: (Car Wash, etc) \$ _____
Auto Registration \$ _____
Vehicle Lease Payments \$ _____

Casualty Loss:
Loss must exceed 10% of your gross income.
Bring all details including receipts and insurance
reimbursements.

2015 & 2016 Form 1098-T Required
Copies of Receipts for Books/Supplies Required
Bring School Account Transcript with Paid Amt.
6 units in one semester qualifies as half time