

Requesting Preparer: _____

Taxpayer Name(s) _____

QUESTIONS FOR ALL ILLINOIS TAXPAYERS

U S Treasury Bonds, bills, notes, or savings bond interest (Form 1040 Line 8 A): _____

Amount of Federal Tax Exempt interest and dividend income (Form 1040 Line 8 B): _____

Dividend Income from stocks of Abbott Laboratories (ABT), Abbvie (ABBV), Caterpillar Tractor (CAT): _____

Taxable amount(s) included on any Form 1099R with a distribution code of 1D, 4D or 7D (These distributions are now taxable in Illinois): _____

Contributions made to the Bright Star, College Illinois or Bright Directions college savings plans: _____

Distributions from Bright Star, College Illinois or Bright Directions college savings plans if included in Line 1 of Illinois 1040 because taxpayer claimed a Federal American Opportunity or Life Time Learning Credit: _____

Illinois Property Taxes paid in 2018 on your principal residence: _____

Illinois County in which your principal residence is located: _____

County Property Tax Number of your principal residence: _____

Amount of out-of-state purchases where no Illinois Sales Tax was charged: _____

Illinois Income Tax Withholdings: _____

Amount of 2017 Refund (if any) applied to your 2018 tax liability: _____

Estimated Illinois Taxes paid applicable to 2018

Date of each payment: _____

Amount of each payment: _____

Refund - Direct Deposit – Bank Routing & Account Number: _____

Is this account located in the United States: _____

Balance due – Direct Debit: Bank Routing & Account Number: _____

Amount of Refund (if any) to be applied to your 2019 tax liability: _____

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