

2019 Wisconsin Tax-Aide Information Sheet

State Tax Assistance Program

Taxpayer Name: _____ **Date:** _____

Wisconsin Residence: City / Village / Town (circle one) of _____
 County of _____ School District _____

1. Did you (and your spouse, if applicable) live in Wisconsin **ALL** of last year? Yes No
2. Did you make any Estimated Tax Payments to the Wisconsin Department of Revenue? . . Yes No
 - a. **If Yes**, enter total of Estimated Tax Payments made during the year. . . \$ _____
3. Did you pay Medical Insurance Premiums in 2019? Yes No
 - a. **If Yes**, were premiums paid from earnings **BEFORE** taxes were deducted? . . Yes No Don't Know
 - b. **If 3.a. is No or Don't Know**, enter Medical Premiums Paid:
 - 1) Medicare Insurance Parts A, B, C, D . . \$ _____ (*don't include amounts deducted from Social Security*)
 - 2) Medicare Supplemental Insurance . . . \$ _____
 - 3) Health Insurance \$ _____
 - 4) Dental Insurance \$ _____
 - 5) Vision Insurance \$ _____
 - 6) Badger Care Insurance \$ _____
 - 7) Other Insurance \$ _____
4. Did you pay Long-term Care Insurance premiums in 2019? Yes No

If Yes: Taxpayer: \$ _____ Spouse: \$ _____
5. Did you pay tuition for private schools for elementary and/or high school students? . . Yes \$ _____ No
6. Did you contribute to a Wisconsin EdVest or Tomorrow's Scholar account? Yes \$ _____ No
7. Did you pay Tuition and/or fees to a Wisconsin or Minnesota* college or vocational school in 2019?
 (* *Minnesota includes only public colleges or vocational schools*) Yes \$ _____ No
8. How much Rent did you pay for your Primary Residence(s) in 2019 (*full & part-year residents only*)? \$ _____
 Was heat included in your rent? . . . Yes No
9. How much did you pay in Property Taxes for your Primary Residence in 2019? \$ _____
Full & part-year residents only; Do not include assessments, trash pick-up, recycling fees, etc.
10. Did you buy anything outside of Wisconsin this year, which was used in Wisconsin)
 for which no sales tax was charged? If so, enter amount of purchases Yes \$ _____ No
11. Do you want to claim the Homestead Credit if possible (*full year residents only*)? Yes No

If Yes, do you have a completed Rent Certificate (no errors or corrections visible)? Yes No

Or, do you have a copy of your 2019 Property Tax Bill (whether paid or not)? Yes No

If claiming the Homestead Credit, list income from any of the following sources:

 - a. Federal SSI (Do not include your children's SSI) \$ _____
 - b. Wisconsin SSI (Do not include your children's SSI) \$ _____
 - c. Caretaker Supplement. \$ _____
 - d. VA Benefits (Military Compensation) \$ _____
 - e. Scholarships / Fellowships / Grants / VEAP / GI Bill. \$ _____
 - f. Court Ordered Child Support \$ _____
 - g. Wisconsin Works or County Relief Amount Received. \$ _____
 Number of months you did NOT receive Wisconsin Works or County Relief Payments _____
 - h. Kinship Care / Other Public Assistance \$ _____

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12. Did you receive Military / Uniformed Services Retirement benefit payments in 2019? Yes No

This includes retirement payments received from:

- a. The U.S. military retirement system (including payments from the Retired Serviceman's Family Protection Plan or the Survivor Benefit Plan). These retirement benefits are paid from the Defense Finance and Accounting Service.
- b. The U.S. government that relate to service with the Coast Guard, the commissioned corps of the National Oceanic and Atmospheric Administration, or the commissioned corps of the Public Health Service.

13. Did you receive payments from the Milwaukee City Employees, Milwaukee City Police Officers, Milwaukee Fire Fighters, Milwaukee Public School Teachers, Milwaukee County Employees, Milwaukee Sheriff, **OR** Wisconsin State Teachers retirement systems in 2019? Yes No

- a. **If Yes**, were you Yes No
 - 1) retired from the system before January 1, 1964, or
 - 2) a member of the system as of December 31, 1963, retiring at a later date and payments you receive are from an account established before 1964, or
 - 3) receiving payments from the system as the beneficiary of an individual who met either condition 1 or 2.

14. Did you receive payments from a federal retirement system* in 2019? Yes No

- a. **If Yes**, were you Yes No
 - 1) retired from the system before January 1, 1964, or
 - 2) a member of the system as of December 31, 1963, retiring at a later date and payments you receive are from an account established before 1964, or
 - 3) receiving payments from the system as the beneficiary of an individual who met either condition 1 or 2.

* A "federal retirement system" is a United States government civilian employee retirement system. Examples of such retirement systems include the Civil Service Retirement System and the Federal Employees' Retirement System. These retirement benefits are paid from the U.S. Office of Personnel Management. Payments from the federal Thrift Savings Plan do not qualify for the subtraction.

Legal Residence (Domicile) Questionnaire (Non-residents and Part-year Residents only)

Your answers to these questions will be used to determine your legal residence. Certain types of income are either taxable or nontaxable to Wisconsin based upon whether you were a legal resident of Wisconsin at the time you received such income.

Please one: (If married filing joint return check one box for each spouse.)

You Spouse

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Full-year Wisconsin resident; did not change domicile from Wisconsin during 2019. |
| <input type="checkbox"/> | <input type="checkbox"/> | Changed legal residence from Wisconsin during 2019; have not moved back to Wisconsin. |
| <input type="checkbox"/> | <input type="checkbox"/> | Changed legal residence from Wisconsin during or before 2019; have moved back to Wisconsin. |
| <input type="checkbox"/> | <input type="checkbox"/> | Changed legal residence to Wisconsin from _____ (state or country) on _____ (date) during 2019; no previous Wisconsin residency. If you check this box, do not complete the rest of the questionnaire. |
| <input type="checkbox"/> | <input type="checkbox"/> | Was a nonresident of Wisconsin for all of 2019. Resident of _____
(Nonresident alien; please indicate country) |

If you changed your legal residence from Wisconsin during 2018 or 2019 and you did not previously complete a questionnaire for that change, answer the following questions.

1. a. On what date did you move from Wisconsin? _____
 b. When you moved from Wisconsin, did you intend to move back to Wisconsin? _____ If yes, when? _____
 c. If you moved back to Wisconsin, indicate date and explain the circumstances under which you moved back to Wisconsin. _____
2. Did you establish a legal residence in another state? _____ If yes, in which state and on what date? _____
3. After establishing legal residency in the new state, list the dates you were in Wisconsin. _____
4. When were you physically present in your new state of legal residence (please list dates)? _____
5. Did your spouse and dependent children (if any) move to your new state of legal residence? _____ If yes, when? _____
6. a. On what date did you begin working in your new state of legal residence? _____
 b. Was your job permanent, temporary, or seasonal? Check one and explain _____
7. In your new state of legal residence, referred to in question 2, did you:

a. Register to vote? _____	If yes, when? _____	If no, why not? _____
b. Purchase a home? _____	If yes, when? _____	If no, why not? _____
c. Obtain a driver's license? _____	If yes, when? _____	If no, why not? _____
d. Register an auto or other vehicle? _____	If yes, when? _____	If no, why not? _____
e. File resident income tax returns? _____	If yes, what years filed? _____	If no, why not? _____
8. Since changing your legal residence from Wisconsin, have you:

a. Performed services for income in Wisconsin? _____	If yes, when? _____
b. Purchased/renewed Wisconsin auto license plates? _____	If yes, when? _____
c. Renewed a Wisconsin driver's license? _____	If yes, when? _____
d. Voted in Wisconsin, in person or by absentee ballot? _____	If yes, when? _____
e. Attended or sent your children to Wisconsin schools? _____	If yes, when? _____
f. Purchased a Wisconsin resident hunting, fishing, or trapping license? _____	If yes, when? _____
Type of license? _____	County purchased in? _____
g. Listed Wisconsin as your state of legal residence for purposes of your auto insurance? _____	
h. Listed Wisconsin as your state of legal residence for purposes of your will? _____	
i. Listed Wisconsin as your state of legal residence for purposes of any legal proceedings? _____	If yes, when? _____
j. Obtained or renewed any Wisconsin trade or professional licenses or union memberships? _____	If yes, when? _____
9. If you answered "yes" to any of the questions 8a through 8j, please explain why you have taken such action. _____
10. Did you or your spouse own the real estate you occupied as your home while living in Wisconsin? _____ If yes, have you disposed of it? _____ If yes, when? _____ If you still own the Wisconsin home, what use do you make of it and how often? _____
11. If you established a legal residence in a new state but are using a Wisconsin address on your 2019 tax returns, please explain. _____