

2017 HEALTH INSURANCE COVERAGE

ALL CLIENTS & THEIR DEPENDENTS MUST PROVIDE PROOF OF HEALTH INSURANCE COVERAGE FOR INCOME TAX PREPARATION.

- 1.) The IRS requires that you report certain information related to your healthcare coverage on your 2017 tax return. Please read the following statements carefully. More than one might apply to your “tax family” –
- a. If you had healthcare coverage with a government Marketplace (Exchange) during 2017, please provide form 1095-A, issued by the Marketplace. In some family situations you may have more than one 1095-A.
 - b. If you are claiming someone on your return who was included on another taxpayer’s policy with a Marketplace, you will also need a copy of that taxpayer’s 1095-A.
 - c. If your dependent filed a 2017 income tax return with another tax practitioner, please provide a copy of the tax return that was filed.
 - d. If you had compliant health insurance through an employer plan, private policy or with a government plan, provide form 1095-B, 1095-C, or other proof of insurance document. This includes a copy of your medical insurance card.
 - e. If you were issued a hardship exemption by the Marketplace (Exchange), provide all applicable exemption certificate numbers issued for each member of your family.
 - f. Complete the following information for every individual included in your “tax family” (including yourself) who did NOT have health insurance coverage for all 12 months in 2017 –

(1) Name of person who did NOT have insurance coverage:

(2) Circle the month(s) where health insurance coverage was NOT provided:

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

ATTACH A COPY OF THIS FORM FOR ADDITIONAL “TAX FAMILY” MEMBERS WHO DID NOT HAVE COVERAGE FOR ALL 12 MONTHS IN 2017.

- 2.) Complete all information requested on the Healthcare Coverage Questionnaire for your “tax family” (see next page):

