Solar Tax Worksheet for New Solar Systems

Instructions: This worksheet is provided to you to help you gather tax information for your solar tax credit forms. Please complete questionnaire and return it to me as soon as possible.

**Tax Year: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Taxpayer Information: Spouse Information:**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address where solar panels are installed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Is this your Principle Residence? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Solar Information:**

Total amount of Solar KWHs/$ (solar export credit – usually on the bottom of the 3rd page of the bill for APS) as recorded on your utility bills for the calendar year.

If you are unsure of which numbers to use for KWHs, or for assistance in understanding your utility bill, please contact your utility company for assistance.

Jan \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_ May \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_ Sep \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_

Feb \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_ Jun \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_ Oct \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_

Mar \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_ Jul \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_ Nov \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_

Apr \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_ Aug \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_ Dec \_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_

Total: \_\_\_\_\_\_\_\_\_\_ $ \_\_\_\_\_\_\_\_\_\_

Name of your utility company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total Interest Paid on system financing in the calendar year (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Fees paid for solar tax form preparation for previous year return (if completed by a different firm): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you receive any financial compensation for referrals? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If yes, list amount: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Have you already filed for your federal and state tax credits? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you receive any rebates (non-tax related) towards your solar system? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If yes, list amount: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**This information is true to the best of my knowledge.**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Taxpayer Signature Date

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Spouse Signature Date