

2017 Tax Questionnaire

	Taxpayer	Spouse
Name		
Occupation		
Date of Birth		
Cell Phone		
Driver's License #		
Date Issued		
Date Expires		
State of Issue		
Email		

Preferred method of contact? **Circle one:** Taxpayer or Spouse **Check one:** Cell _____ Email _____

Personal

Yes No

- Did your marital status change?
If yes, please explain: _____
- Did your address change?
If yes, what is your new address?: _____
Move Date: _____
- Can you be claimed as a dependent by another taxpayer?
- Do you want direct deposit for any refund? Please enter the last 4 digits of your bank account number: _____
- Is this the same account as last year? *If no, provide us with the following information:*
Bank Name: _____ Routing Number: _____ Account #: _____
- Did you pay any estimated taxes for 2017? *If yes, provide copies of cancelled check(s) or payment schedule.*
- Did you receive an Identity Protection PIN (IP PIN) from the IRS due to identity theft? *If yes, attach the IRS letter.*

Dependent

Yes No

- Were there any changes in dependents from the prior year?
If yes, explain: _____
- Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,100?
- Do you have dependents who must file a tax return?
- Did you provide over half the support for any other person(s) other than your dependent children?
- Did you pay for child care? *Fill out our Child & Dependent Care worksheet from our website.*
- If you are divorced or separated with child(ren), do you have a divorce decree?
or other form of separation agreement which establishes custodial responsibilities?
- Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft?
If yes, attach the IRS letter.
- Did you pay more than one-half of the support for your parent(s)?

List your dependents for 2017

Name	Date of Birth	SSN	Months with you in 2017

Education

Yes No

- Names of students in college: Student #1 _____ Student #2 _____
- Do the college courses lead to a degree? Degree description: Student #1 _____ Student #2 _____
If yes, provide Form(s) 1098-T, Bursar's statement(s) showing tuition paid & receipts paid for books and other expenses.
- Did anyone in your family receive any grants, scholarships or fellowships?
If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?
- Did your employer reimburse any of the above expenses? How much \$ _____
- Did you make any withdrawals from an education savings or 529 Plan account? *Provide Form 1099-Q*
- Did you make any contributions to an education savings or 529 Plan account? *Provide statements.*
- Did you pay any student loan interest? *Provide Form 1098-E.*
- Did you cash any Series EE or I U.S. Savings bonds issued after 1989? *Provide Form 1099-INT*

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Retirement

Yes No

- Were you eligible to participate in a pension or retirement plan?
- Did you receive any Social Security benefits? *Provide Form 1099-SSA*
- Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), 403(b) or profit sharing plan?
If yes, provide Form 1099-R.
- Did you make any contributions or rollovers to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or 403(b)?
- Have you ever made a non-deductible contribution to your Traditional (Non Roth) IRA?
- Did you convert a Traditional IRA to a Roth IRA?

Job, Business, Investment & Rental Income

Yes No

- ~ ~ How many employers did you work for? Taxpayer _____ Spouse _____
- Did you start or purchase a new business?
Check box Sole proprietor (Complete Business worksheet from our website) Partnership Corporation
- Did you have income from a small business, partnership or S corporation? *Provide Profit & Loss or Form K-1*
___Yes ___No Did you pay any non-employees \$600 or more for services rendered to your business?
___Yes ___No Did you already issue 1099 forms to your service providers?
___Yes ___No If not, do you need us to prepare your 1099 forms?
- Did you receive tip income not reported to your employer?
- Did you have any rental income or expense? *If yes, complete the Rental worksheet from our website.*
___Yes ___No Did you pay any non-employees \$600 or more for services rendered to your rental?
___Yes ___No Did you already issue 1099 forms to your service providers?
___Yes ___No If not, do you need us to prepare your 1099 forms?
- Did you buy, sell or exchange any rental property?
If yes, explain : _____
- Did you own at least 10% of the rental property and have substantial involvement in managing it?
- Did you pay anyone \$600 or more for services rendered for your rental property?
- Did you issue 1099-Misc Forms to your service providers?
- If no, please check yes if you would like us to prepare your 1099-Misc for you.*
- Did you use your car for purposes related to rental properties? *If yes, complete the Vehicle worksheet for each vehicle used.*
Complete section section 1 if you are claiming standard mileage rate. For actual expenses, also complete section 2.
- Did you receive any awards, prizes, hobby income, gambling or lottery winnings? *Provide statement or W2G*
- Did you receive any alimony?
- Do you expect a large fluctuation in income, deductions, or withholding next year?
- Did you have any interest income? *Provide Form 1099-Int or 1099-B if paid from Brokerage account*
- Did you have any dividend income? *Form 1099-DIV or 1099-B if paid from Brokerage account*
- Did you receive any Jury Duty pay? \$_____ (taxpayer or spouse?)
- Did you receive Election Board pay? \$_____ (taxpayer or spouse?)
- Did you receive any income tax refunds? *Provide Form 1099-G*

Purchases, Sales and Debt

Yes No

- Did you sell, exchange, or purchase any assets used in your trade or business?
- Did you acquire a new or additional interest in a partnership or S corporation?
- Did you sell, exchange, or purchase any real estate? *Provide HUD statement*
- Did you receive any payments from property sold in a prior year? *Provide HUD statement*
- Did you purchase or sell your main or a second home? *Provide HUD statement*
- Did you foreclose or abandon a home or real property? *Provide Form 1099-A*
- Did you acquire or dispose of any stock? *Provide Form 1099-B*
- Did you take out a home equity loan? *Provide Form 1098*
- Did you refinance a principal residence or second home? *Provide HUD statement*
- Did you sell an existing business, rental, or other property? *Provide Sales Agreement*
- Did you lend money with the understanding of repayment & this year it became totally uncollectable?
Provide Promissory Note.
- Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)? *Provide Form 1099-C*
- Were any stock options granted or did you exercise or sell any stock options?
- Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year? *Provide invoice*

2017 Tax Questionnaire

Health Savings Account (HSA) (Not Flexible Spending Account(FSA))

Yes No

- Did you have a Health Savings Account (not a FSA)? *If yes, provide Form 5498-SA*
- Did you make any contributions to a Health savings account (HSA)?
- Did you first begin your HSA coverage in 2017? *If yes, provide us with the start date: _____*
- Did your HSA coverage end in 2017? *If yes, provide us with the end date: _____*
- Is the contribution you made included on your W2?
- Did the plan cover your family?
- Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA?
- Did you have High Deductible Health Insurance Plan for all 12 months last year? *If no, enter # of months of coverage*
- Did you pay medical expenses from your HSA? *If yes, provide Form 1099-SA*
- Were all expenses paid, Qualified Medical Expenses?

Medical & Health Care

Yes No

- Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a *If yes, attach any Form(s) 1095-B and/or 1095-C you received.*
- Did anyone in your family qualify for an exemption from the health care coverage mandate? Examples of exemptions include to) certain non-citizens, members of a health care sharing ministry, members of Federally-recognized Indian tribes, and the Marketplace. *If yes, attach the Exemption, Certificate Number (ECN) or type of exemption.*
- Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? *If yes, attach any Form(s) 1095-A you received.*
- If you answered YES to the question above, was the the policy shared with or did you cover anyone who is not included in your earlier in this section)?*
- Did you pay long-term care premiums for yourself or your spouse?
- If you are a business owner, did you pay health insurance premiums for your employees?
- Did you receive any Health Coverage Tax Credit (HCTC) advance payments? *If yes, attach any Form(s) 1099-H you received.*

Itemized Deduction(s)

Yes No

- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
- Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? *If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made.*
- Did you donate a vehicle or boat during the year? *If yes, attach Form 1098-C or other written acknowledgement from the donee organization.*
- Did you pay real estate taxes for your primary home and/or second home?
- Did you pay any mortgage interest on an existing home loan? *If yes, attach any Form(s) 1098 you received.*
- Did you incur interest expenses associated with any investment accounts you held?
- Did you have an expense account or allowance from your employer?
- Did you have any job expenses that did not qualify for reimbursement by your employer. *Provide a catagorized summary*
- Did you have any jobs expenses related to seeking a new job?
- Did you make any major purchases during the year (cars, boats, etc.)? *Provide invoice showing sales tax paid.*
- Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax? \$ _____

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Miscellaneous

Yes No

- Did you pay alimony?
If yes, provide the Amount \$ _____ (Do not Include child support). Ex-spouse's SS# _____ - _____ - _____
- Did you make gifts of more than \$14,000 to any individual?
- Did you utilize an area of your home for business purposes? *If yes, complete Home Office worksheet from our website*
- Did you use your car for other than commuting? *If yes, complete Vehicle Expense Worksheet from our website*
Check box: Job Rental Small business Partnership S Corporation
- Did you engage in any bartering transactions?
- Did you incur classroom expense as a teacher for which you were not reimbursed? \$ _____
- Did you retire or change jobs?
- Did you incur moving costs because of a job change more than 50 miles from your home?
- Did you pay any individual as a household employee?
- Did you make energy efficient improvements to your main home?
- Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
- Did you have an account or signature authority with a foreign financial institution in which the account balance was over at any time?
- Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?
- Did you receive correspondence from the State or the IRS? *If yes, provide copies if you need assistance or had to pay more*
- Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?
- Do you want to designate \$3 to the Presidential Election Campaign Fund? *If you check yes, it will not change your tax or your refund.*
- Was your earned income credit denied in a previous year?

Taxpayer Signature: _____ Date: _____

Spouse Signature: _____ Date: _____