

2017 Tax Information Questionnaire

(To be completed by all tax clients)

Name: _____

Address: _____

Email address: _____

Phone:(Circle Best # to call) (H) _____ (W) _____ (Cell) _____

***** For Clients Dropping Off.....Please provide details to all "yes" answers on next page**

Yes No

GENERAL INFORMATION	
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1		Were there any births, adoptions, marriages, divorces, or deaths in your household or did any children cease to be your dependents in 2017?
2		Did you have any life changing issues during 2017 (i.e. retirement, children graduating, etc.?)
3		Did any of your dependent children have any income (wages, interest, etc.?) (possible kiddie tax)
4		Do you have any dependents living with you or are you supporting anyone not living with you?
5		Are you or any of your dependents disabled or blind?
6		Can you or your spouse be claimed as a dependent by someone else?
7		Did you incur child care or dependent care expenses in 2017 (for children up until the day they turn 13)? If so, we need name, address, EIN or Soc Sec # of provider & amount paid for each child.
8		Did you move during 2017? From where _____ Date of move _____
9		Did you reside in more than one state during 2017? If yes, which states? _____
10		Did you receive any notices from the IRS or the State? If yes, please attach.
11		Do you wish to have \$3 (or \$6 on a joint return) of your taxes applied to the Presidential Campaign Fund (this will not affect the amount of refund or balance due on your tax return)? Do you wish to contribute to any state funds, and if so, which funds?
12		Would you like your refund (if applicable) to be deposited directly into your bank? If so, provide Name of Bank _____ Bank Routing # _____ and Account # _____ and state whether this is a checking or savings:

Yes No

INCOME INFORMATION	
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13		Have you received all W-2's from all employers? How many W-2's are attached? _____
14		Did you use your vehicle on the job other than for commuting to work? (Please provide mileage log)
15		Does your employer reimburse you for mileage? _____ Is the amount included in your W-2? _____
16		Did you work out of town at any time during 2017?
17		Did you earn income from a state other than the state in which you live? If yes, what state? _____
18		Did you or your spouse receive any tips not reported to your (or your spouse's) employer?
19		Did you have any interest or dividend income?
20		Did you buy, sell, or trade any assets (stocks, real estate, etc.) during the year?
21		During 2017, did you have an interest in, or signature over a bank or brokerage account in a foreign country, or were you a grantor of or transferor to a foreign trust?
22		Are you an authorized signature holder on a foreign bank account? (e.g. on a parent's or other relative's foreign acct)
23		Did you have any income from a foreign country (e.g.. wages, rental income, interest income)?
24		Were you required to prepare a tax return for another country?
25		Are you holding any US Savings Bonds that have matured?
26		Did you surrender any U.S. Savings Bonds during 2017? If yes, see next question.
27		Did you cash any series EE or I U.S. Bonds that were issued after 1989 to pay for college?
28		Did you receive any state or local income tax refunds from prior years (other than your 2016 refund)
29		Do you or your spouse have any IRA accounts? If so, what kind? (i.e. traditional or ROTH)
30		Have you ever made a nondeductible contribution to a traditional IRA?

Yes No

		31	Did you or your spouse contribute funds to either a traditional or ROTH IRA?
		32	Did you withdraw money from any retirement accounts or "rollover" a retirement plan into another plan? (Including your RMD)
		33	Did you convert any retirement funds to ROTH funds?
		34	Did you recharacterize any IRAs this year?
		35	Did you receive a Schedule K-1 from a Partnership, S-Corp, Trust or Estate? If so, please attach
		36	Did you or your spouse receive any social security benefits during the year? Attach Form(s) SSA-1099
		37	Did you receive any disability income during 2017? \$ _____ Attach 1099-R.
		38	Did you receive any type of prize or award during 2017, including lottery winnings?
		39	Did you incur any gambling winnings/losses during 2017? Please provide win-loss statements and summary of winnings (from the casino). Also provide any Form W-2G's that you received as well as a summary sheet of W-2G's received (can be obtained on casino website)
		40	Did you or your spouse receive any unemployment benefits during 2017 (they are now paperless & you will need to get the f
		41	Did you or your spouse receive any Combat Pay or Jury Duty Pay?
		42	Did you or your spouse receive any alimony, or separate maintenance payments?
		43	Were you given any stock options and/or did you exercise any stock options in 2017?
		44	If you receive(d) restricted stock at work, did any become vested in 2017?
		45	Did you have any credit card debt forgiven in 2017? Did you receive a 1099C?
		46	Does anyone owe you money which has been deemed uncollectible by the appropriate authorities?
		47	Did you receive any income not mentioned in the above questions? If so, what kind? _____

BUSINESS/ RENTAL INFORMATION

Yes No

		48	Do you own a business? Please provide all business income and expenses
		49	Did you make any payments in 2017 that would require you to send out Form 1099? If yes, did you or will you send out all required forms?
		50	Did you pay health insurance premiums for your employees during the year?
		51	Did you report as income all of the cash you collected in 2017?
		52	Did you purchase any business assets (furniture, equipment, etc.) or convert any assets to business use during the year? If yes, please list on an attached sheet the date placed in service, cost or basis of asset, and business use percentage.
		53	Did you dispose of any business assets (including real estate)? If yes, please list on an attached sheet the date removed from service, selling price and expense of sale.
		54	Do you accept credit card payments in your business? _____ If so, did you receive Form 1099-K? _____
		55	Did you purchase any gasoline, diesel, or special fuels for non-highway business use?
		56	Do you own rental property? What percentage of time did you spend managing your rentals? _____ Please provide all rental income and expenses
		57	Did you purchase any rental property assets (furniture, appliances, etc.) or converted any assets to business use during the year? If yes, please list on an attached sheet the date placed in service, cost or basis of asset, and business use percentage.
		58	Did you dispose of any rental property assets? If yes, please list on an attached sheet the date removed from service, selling price and expense of sale.

OTHER INFORMATION

Yes No

		59	Did you have health care coverage for yourself and everyone claimed on the tax return for the entire year?
		59(a)	If yes, where did you purchase the health care coverage? (Please provide proof of coverage) ___ Employer ___ Medicaid ___ Medicare ___ Marketplace (Exchange) ___ Other
		59(b)	If no, (i.e. you did not have health insurance for each and every month of 2017), then please complete our Supplemental Health Care Coverage Questionnaire.

Yes No

		59(c) If you purchased from Marketplace, you must provide Form 1095-A (we cannot file your tax return without this form). If you received insurance from your employer, please provide either Form 1095-B or 1095-C. (You may not receive if your employer has less than 50 employees)
		59(d) Did any member of your household receive an exemption from the marketplace? If so, please provide the Exemption Certificate Number (ECN)_____.
		60 Did you incur any work-related educational expenses?
		61 Does your employer reimburse you for tuition expenses?
		62 Did you pay any college tuition & fees for yourself, spouse or dependent (even if classes were attended in another year)...Did you pay for books, supplies & equipment needed for course? Please provide a Billing/Payments schedule from the college for both 2017 and 2016. Also provide Form 1098-T.
		63 Did you pay any student loan interest in 2017 (Attach form 1098-E)
		64 Did you make any alimony or separate maintenance payments?
		65 Did you make any charitable contributions directly from your IRA account?
		66 Did you incur a loss due to damaged or stolen property (casualty losses)?
		67 Did you purchase or sell your home or your second home during 2017? (If yes, please provide settlement document (HUD-1) and Form 1099-S, if applicable)
		68 Did you refinance your principal home or your second home during 2017? (If yes, please provide settlement document (HUD-1) and Form 1099-S, if applicable). Of the new loan principal balance, how much is related to home acquisition (i.e. purchase of home or improvements)...and how much is related to non-home related items? (for instance - did you use some of the proceeds from the re-fi to buy a new car or pay college tuition?)
		69 Did you take out a home equity loan during 2017? (If yes, please provide settlement document (HUD-1) and Form 1099-S, if applicable). Were proceeds from loan used for purposes OTHER THAN improving your home? Please explain.
		70 Did you get a loan modification (in this or prior years?)
		71 Did you take a New Homebuyer Credit (Loan) in 2008 that you are now paying back? (payback is from 2010 - 2025)
		72 Did you rent out your home or use it for business?
		73 Do you own a vacation home that was rented to someone else at anytime during the year?
		74 Did you purchase solar property (solar electric, solar water heating, fuel cell property) in 2017?
		75 Did you make any gifts (cash or property) over \$14,000 to any one person in 2017?
		76 Did you pay wages of \$2,000 or more during 2017 or \$1,000 in any calendar quarter to any one household employee?

Yes No

ITEMIZED DEDUCTIONS (BRING RECEIPTS/DOCUMENTATION FOR ALL EXPENSES)

		77 Did you pay mortgage interest (including home equity) and/or mortgage insurance premiums in 2017? (Form 1098)
		78 Did you pay any real estate taxes in 2017?
		79 Any auto taxes paid in 2017?
		80 Did you make cash or noncash charitable contributions in 2017? (please let us know, even if you do not itemize!!) For non-cash contributions, please provide a detailed listing of the items donated, noting the condition (and thrift value) of each. Attach this listing to the receipt you received from the charitable organization (e.g. Goodwill).
		81 Did you drive your car for charitable purposes? If so, please provide mileage
		82 Did you pay any health, dental or LTC insurance premiums or pay medical expenses (including prescriptions)? Please obtain 2017 prescription summary from your pharmacy (in lieu of individual pharmacy receipts). Also provide mileage and lodging (not meals) for seeking medical care.
		83 Do you have an H.S.A. (Health Savings) Account? If so, please provide forms 1099SA and 5498SA
		84 In addition to your payroll deduction HSA contributions, did you contribute directly to your HSA account in 2017?
		85 Did you pay any expenses for your W-2 job (union dues, uniforms, safety equip, etc.)?
		86 Did you make any large purchases (car, boat, etc.) for state sales tax deductions?
		87 Did you make any estimated Federal and State tax payments during the year?
		88 For new clients only: did you pay any tax preparation fees in 2017 for prior year's taxes?
		89 Have you provided ALL your deductions?

