

2017 Questionnaire

Please check the appropriate box and include all necessary details and documentation.

Yes No

Personal Information

- Did your marital status change during the year? If yes, explain _____
- Did your address change from last year? _____
- Can you be claimed as a dependent by another taxpayer?
- Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS during the tax year?
- Did you or any dependent receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? **If yes, attach the IRS letter.**

Dependent Information

- 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 total investment income in excess of \$2,100?
- Do you have dependents who must file a tax return? If so, please provide a copy of their filed return.
- Did you provide over half the support for any other person(s) other than your dependent children during the year?
- Did you pay for child care while you worked, looked for work, or while a full-time student?
- Did you pay any expenses related to the adoption of a child during the year?

Business Information

- Did you start a new business or farm, or purchase rental or royalty property this year?
- Did you acquire a new or additional interest in a partnership or S corporation?
- Did you sell an existing business, rental or other property this year? If yes, please provide documents.
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.) or convert any personal assets to business use?
- Did you pay health insurance premiums for your employees this year?
- Did you receive any Health Coverage Tax Credit (HCTC) advance payments? If yes, attach any Form(s) 1099-H you received.
- Did you use your car for business (other than to and from work)? If yes, complete and sign the auto mileage sheet.
- Was your home rented out or used for business?
- Did you make any payments in 2017 in the course of a trade or business which would require you to file Form(s) 1099?

Yes No

- If you checked **yes** above, did you or will you file ALL required Form(s) 1099?

Investment Information

- Did you buy or sell any stocks, bonds or other investment property in 2017?
- Did you exercise any stock options or sell any related stock?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, please provide settlement statements.
- Did you have any debts cancelled or forgiven this year, such as a home mortgage or student loan(s)?
- Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?
- Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal, or fuel cell property or improvements?

Income Information

- Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?
- Did you receive any unemployment benefits during the year?
- Did you receive any other miscellaneous income, such as tips, commissions, jury duty, social security benefits, disability income, prizes, or gambling winnings?
- Do you expect a large fluctuation in income, deductions, or withholding next year? If so, please explain.

Retirement Information

- Did you make any withdrawals/receive a distribution from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?
- If yes, were any withdrawals due to a Federally declared disaster?
- Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?
- Did you transfer or rollover any amount from one retirement plan to another?
- Do you wish to make a contribution to an IRA or retirement plan if eligible?

Education Information

- Did you, your spouse, or dependent incur any educational expenses during the year that are required to attend a college, university or vocational school? If yes, include all Form(s) 1098-T and receipts/lists for qualified tuition and related expenses.
- Did you make any withdrawals from an education savings or 529 Plan account? If so, include all Form 1099-Q(s).
- Did you pay any student loan interest this year?

Yes No

Health Care Information

- Did you and your dependents have qualifying health care coverage for the full year? If yes, attach any Form(s) 1095-A, 1095-B and/or 1095-C you received.
- Did anyone in your family qualify for an exemption from the health care coverage mandate? 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.
- Did you make any contributions to or receive any distributions from a Health savings account (HSA) or Archer MSA? If yes, include Form 1099-SA.
- If yes, were all distributions for qualified medical expenses?
- Did you pay long-term care premiums for yourself or your family?
- Did you make any contributions to or receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, provide Form 1099-QA.

Itemized Deduction Information

- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
- Did you pay real estate taxes for your primary home and/or second home?
- Did you pay sales tax on motor vehicle, aircraft, boat or home remodel during the year? If yes, please attach receipts showing sales tax paid.
- 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 incur a casualty or theft loss or any condemnation awards during the year?
- Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? If yes, please provide details and receipts from the charity to substantiate all contributions made.
- Were all non-cash charitable contributions in good condition or better?
- Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgment from the donee organization.
- Did you have an expense account or allowance during the year?
- Did you use your car on the job, for other than commuting, and were not reimbursed?
- Did you have any expenses related to seeking a new job during the year?
- Did you incur moving expenses due to a change of employment?

Miscellaneous Information

- Did you incur any expenses working as a teacher, counselor, or principal for classes kindergarten through grade 12? If so, how much (up to \$250)?
- Did you or your spouse make gifts of more than \$14,000 to any individual?

Yes No

- Did you engage in any bartering transactions?
- Did you retire or change jobs this year?
- Did you pay any individual as a household employee during the year?
- Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
- Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?
- 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, explain: _____
- Did you make any estimated tax payments for 2017? If yes, please provide dates and amounts of estimated tax payments.
- If you have an overpayment of 2017 taxes, do you want the excess applied to your 2018 estimated tax (instead of being refunded)?
- If you have a refund due, do you want it directly deposited into your bank account?
- If you owe with your return, would you like it automatically drafted from your bank account?
- Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.
- Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- May the IRS discuss your tax return with your preparer?
- Would you prefer to receive your 2018 organizer through your secure portal instead of by mail?
- Would you like to receive a paper copy of your tax return in addition to the electronic copy?

Please sign here: _____ Print Name _____

Preferred email: _____

Preferred phone: _____ home/cell/work (circle one)

Please list any items not addressed above which may be important to your tax return, as well as any matters you would like to discuss.