INDIVIDUAL TAX CLIENTS REQUESTED INFORMATION

QUESTIONNAIRE:

Personal Information:

1. If you receive a refund, please check the appropriate box:
   ☐ Direct Deposit: **Same Account Information as last year**.
   ☐ Direct Deposit: **New Account**: Bank Name ____________________________________
   Account Number_______________________ Routing Number _____________________ Checking _____ or Savings _____
   ☐ Paper Check
2. How would you like us to contact you with our questions or missing items?
   _____ **E-mail**: E-mail address____
   or _____ **Telephone**: Telephone number____
3. Did your **address change** during the tax year being prepared? ____Yes or ____No
   If yes, please list the new address____
   ____
4. Did you **marital status** change during the tax year being prepared? ____Yes or ____No
   If yes, please describe ____
5. Did your dependents change during the tax year? ____Yes or ____No
   If adding a new dependent list the social security number, date of birth, and relationship
   ____
   Did any of your dependents turn 17 in the tax year? ____Yes or ____No
   Are any of your dependents over 18? ____Yes or ____No
   If yes, were they a full-time student for more than 5 months of the year? ____Yes or ____No
   Inform us if you received a distribution from an Education Savings Account or Qualified Tuition Program. **Provide 1099-Q**

   Are you divorced with children **and** have the children less than 6 months out of the year, **and** planning to claim the exemption for the child? ____Yes or ____No If yes, you will need to have **Form 8332** signed by the custodial parent and provide us with the original.
   (please let us know if you need a copy of the form 8332).

Deductions:

6. List the total amount of the ownership tax paid in the tax year being prepared for **all vehicles** (please use the amounts under own tax and prior O. T. on your vehicle registrations): Total amount: ________________ Please provide the Registration forms.
7. Inform us if you paid interest on a **boat or motor home.** We will need the name of the bank, address, tax id number and amount of interest paid for the tax year. _______________
   ____
8. Did you buy a **new** car/truck/motorcycle in the tax year being prepared? _____Yes or ____No If Yes, please provide a copy of the invoice.
9. Inform us of any charitable contributions. For Non-cash contributions, provide us with a receipt, the description of what was donated, the fair market value amount and the date of

This list is not all inclusive. Let us know of any additional information that pertains to your tax return.

the contribution. List your volunteer mileage for the tax year:________________

10. Did you **buy a home** in the tax year being prepared? ____Yes or ____No If yes, please provide the closing statement. Did you **sell a home** during the tax year? ____ Yes or No ____ If yes, please provide the closing statement.
11. Inform us and **provide proof of sales receipt** if you added energy efficient property to your home during the tax year. Also, if you purchased a new hybrid vehicle or alternative fuel vehicle in the year being prepared, **please provide the sales document.**
12. Did you refinance or borrow on home equity? ____Yes or ____No If Yes, please provide the closing statement and what the funds were used for.
13. Inform us if you had any debts cancelled or forgiven. **Provide the 1099-C**.
14. **Provide amounts of property (real estate) taxes paid in the tax year being prepared, even if you are not itemizing.**
15. Inform us if you paid any student loan interest. **Provide from 1098 E.**
16. Inform us if you, your spouse, or a dependent incurred any tuition expenses to attend a college, university, or vocational school. **Provide 1098-T.**
17. Inform us of any daycare expenses paid during the tax year. Please list provider's name, address, and taxpayer identification number and total amount paid to the provider. Also, please list the dependent name for which the daycare expenses were paid.

    ____

    ____

Investment Information:

18. Retirement plan contributions (OTHER THAN THROUGH YOUR EMPLOYER): List the amounts you contributed, or plan to contribute by April 15th.
    Amount: ________________ Date of contribution: __________
    Please specify type of IRA – Traditional, Roth or Simple
    Inform us if you took an early distribution from a retirement plan, and explain the reason. If the money was reinvested in 60 days we need to know that as well. **Provide the 1099-R**.__________________
    ____
    Inform us if you converted any part of your traditional IRA, SEP, or Simple IRA to a Roth IRA.
    ____
19. Did you make any 529 contributions to a fund during the tax year? ____Yes or ____No
    If yes, list amount: _________ Name of Plan: __________________
20. Did you have a financial interest in a foreign account over $10,000? ____Yes or _____No If yes, please provide any information regarding the account.
21. Inform us if you started a business, purchased rental property, or acquired an interest in a partnership or Corporation. ____
22. If you sold any stocks, bonds or other investment property during the tax year, **provide detail of cost basis, selling price, and dates of original purchase and selling date and form 1098-B**
23. Do you have any worthless stock this year? ____Yes or ____No If Yes, please describe.
    ____
24. Did you withdraw any money from your Health Savings Account (**HSA**)? ____Yes or ____No If yes, were they all for medical expenses? ____Yes or _____No
    Please provide form 1099-SA for the distributions.

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Did you make contributions to your HSA during the tax year being prepared (include contributions made by April 15th of this year)? ______Yes or ______No, If yes, please indicate the amount you contributed.
____

Are you interested in talking with us on any of the following Services, please circle any that apply:

Financial Needs Analysis	**Education Planning**
Retirement Planning	**Life Insurance Planning**
Investment Planning	**Tax Planning**

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