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Questionnaire for 2019 Tax Returns

Please use this questionnaire to ensure we have all the pertinent information and data for preparation of your tax returns.

Please download, open in Adobe, complete and securely upload the PDF to your client portal. Please do not email this worksheet since it contains sensitive information. You can access your client portal here-

https://howardtaxprep.com/portal-access

Caution: many browsers will give you the warm fuzzy that your information is being saved however when we receive it, the PDF is blank. As such, please download first and then open with Adobe, rather than using your browser.

Worksheets Available

Here is a list of our worksheets. As mentioned before, you do not have to replicate data that is available elsewhere. For example, mortgage interest and real estate taxes reported on Form 1098 do not need to be entered again with our worksheets. Let's keep life simple and easy for you; that's why you hired us.

Contact Info	Used for basic contact information
Dependents	Used for dependents and dependent care
Education	Used for education expenses, student loans, 529
Deductions	Used for moving, medical, local taxes, home, charity, IRA
Small Business	Used for LLCs and S Corps to report income and expenses
Rental Property	Used for rental property income and expenses
Auto Expenses	Used for actual expenses and mileage information
Home Office	Used for home office deductions
Property Sale	Used for reporting real estate sales, home and rental
ExPat	Used for expatriates to report foreign income, dates
Annual Questionnaire*	Used for tax questions including retirement contributions

* Everyone is strongly encouraged to review the annual questionnaire. As tax laws change from year to year, we need to ask questions to ensure you are getting the most out of your tax returns.

Person Submitting form

Your Name ______________________________ Cell Phone ____________________

Primary Email ____

Tax Year ____________________ Date Worksheet Completed ____________________

Is this an update to a previously submitted worksheet? ◯ Yes ◯ No

Personal Information

Did your address change?

Did your marital status change?

Can you be claimed as a dependent by another taxpayer?

Did you change any bank accounts for direct deposits?

Did you pay or receive alimony or spousal maintenance?

Did you have income or investment interest in a state other than your resident state?

Are there any life events such as separation, divorce, marriage, new children, adoptions and / or disability?

If you answered Yes to any of these questions, please explain-

Dependent Information

Were there any changes in dependents from the prior year?

Do you alternate dependents with an ex-spouse for tax purposes?

Did any of your children have investment income?

Do you have dependents who have or will file a tax return?

Did you provide support for any dependents besides your children?

Did you pay for child care while you worked or looked for work, or as a full-time student?

If you answered Yes to any of these questions, please explain-

Retirement

Did you make or intend to make by April 15 2019 any IRA or Roth IRA contributions for 2018*?

Did you convert any IRAs into Roth IRAs (backdoor conversion)?

Did you make any Keogh, SIMPLE, SEP or 401k contributions thru your business?

If you answered Yes to any of these questions, please explain-

* **We will provide IRA tax deferral savings plus max Roth IRA amounts when we send your tax returns to you for your review.**

Itemized Deduction Information

Did you incur a casualty or theft loss (fire, flood)?

Did you work away from your resident city or state for part of the year?

Did you make any major purchases during the year (cars, boats, spaceships, etc.)?

Did you make any out of state purchases and not pay sales tax?

Did you pay additional income taxes last year (like a local income tax)?

Did you pay your property taxes early?

Are you a renter (potential state renters' credits)?

If you answered Yes to any of these questions, please explain-

Medical

Did you use HSA or FSA (flex spending) funds to pay for medical expenses?

Did you use an HRA reimbursement or any other reimbursement program for medical expenses?

Did you use any IRA funds to pay for medical expenses?

Did you pay long-term health care premiums for yourself or your family?

Did you pay any COBRA health care coverage continuation premiums?

Did you pay for the care of someone else (for example, parents)?

If you answered Yes to any of these questions, please explain-

Affordable Care Act

The Affordable Care Act aka ACA aka Obamacare has unique tax consequences that we must address. Please don't shoot the messenger.

If you are expatriate (or expat for short), you are NOT required to follow ACA compliance. You may ignore this.

Form 1095 is used to report your health insurance coverage, and it has three sources-

1095-A	Marketplace	Mailed around January 31
1095-B	Private Insurance	Mailed around March 1
1095-C	Employer Sponsored	Mailed around March 1

Regardless of having full-year coverage, **we need copies of any Form 1095** that you receive; big mess otherwise.

Please describe the health insurance coverage that you AND your family had, and the periods of time that you had it. For example, you had a job from Jan thru Apr with company sponsored insurance, used COBRA for May, and then purchased private insurance for Jun thru Dec.

Does anyone in your family qualify for an exemption from the health care coverage mandate? If so, please describe below-

Were there any periods of time in 2019 where you were NOT covered by health insurance? If so, please describe below-

Education

Did you pay any student loan interest?

Did you or a dependent have any tuition or school-related expenses?

Did you make any contributions to an education savings (ESA) or 529 plan account?

Did you use any ESA / 529 plan funds to pay for K-12 or college expenses?

Did you use any IRA funds to pay for higher education?

If you answered Yes to any of these questions, please explain-

Home Stuff, Purchases, Sales and Debt Information

Did you sell, exchange, or purchase any real estate?

Did you use any IRA funds for a down payment for a home purchase?

Did you foreclose or abandon any real estate?

Did you refinance a principal residence or second home?

Did you make energy efficient improvements to your main home?

Are you required to pay back the First Time Home Buyer Credit?

Do you own a motor home, trailer or boat that had a registration tax?

Did you buy or sell any stock including cryptocurrency besides retirement accounts (IRA, 401k)?

Did you have any debts canceled or forgiven?

If you answered Yes to any of these questions, please explain-

Income Information

Did you earn any income such as tips that is not reported on a tax form?

Did you have any gambling winnings?

Did you receive any payments / distributions from a pension, IRA or 401k plan?

Did you receive any Social Security benefits?

Did you receive any unemployment benefits?

Did you receive any disability income?

Did you receive any trust income as a beneficiary?

Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

If you answered Yes to any of these questions, please explain-

Miscellaneous Information

Did you make any estimated tax payments?

Did you make gifts of more than $15,000 to any individual?

Did you pay any individual more than $2,100 as a household employee or nanny?

Did you purchase an alternative fuel vehicle?

Did you travel more than 100 miles for a military reserve post?

Do you have signature authority of a foreign bank account?

If you answered Yes to any of these questions, please explain-

Almost Done!

Is there anything else that might affect your taxes for this year?

Disclosure

I(We) verify that the information provided in this _____ **Tax Questionnaire** is accurate and complete. I(We) understand it is my(our) responsibility to include any and all information concerning income, deductions and other information necessary for the preparation of my (our) tax returns.

Taxpayer Signature ____ Date________________________

Printed Name ____

Spouse Signature ____ Date________________________

Printed Name ____

Please call or email us anytime at questions@howardtaxprep.com with your questions and concerns. Seriously! You can call us and we can complete this for you over the phone, talk about the weather and share vacation ideas.
Thank you in advance, and we look forward to working with you!

Howard Tax Prep LLC