TAX YEAR 2018
INFORMATION QUESTIONNAIRE

NAME ______________________ DOB ______________
SPOUSE'S NAME ______________________ DOB ______________
STREET ADDRESS ______________________ PHONE # ______________
CITY ______________________ STATE ________ ZIPCODE ______________
EMAIL ____

DEPENDENTS NAME DOB WAGES

____

____

____

____

Do you want direct deposit? _____yes _____no If yes, please complete the following banking information section.
Bank Name ______________________ Type of account? _____checking _____ savings
Routing # ______________________ Acct# ______________

Did the taxpayer and/or spouse (if applicable):	YES	NO
Get married, divorced, or widowed at any time during the year?		
Have a change in address or contact information in 2018? If so please update information.		
Have a change in dependents from the prior year? (new dependent or no longer a dependent)		
Did you adopt a child or begin adoption proceedings during the year?		
Did you pay for childcare or other care for a dependent (such as a parent) while you worked or looked for work? **Please provide amount paid, to whom, tax id # and address.**		
Are you or your spouse blind or disabled? Please indicate who is disabled		
Did you receive or pay any alimony payments? If alimony was paid, please provide the name & **social security # of the receipient**		
Do you have any children under the age of 18 or under the age of 24 on 1/1/19 who were full-time students with wages, interest, or dividend income or sold any stock in 2018?		
If yes, do you want us to prepare their return(s)?		
Do you or your spouse have a Revocable or Irrevocable Trust? If yes please indicate which type.		
Type of Trust:		
Were you a resident of, or did you have income in more than one state during 2018?		
Did you pay estimated taxes? If yes please complete the chart below:		

2018 FEDERAL & STATE ESTIMATED TAX PAYMENTS

	Date Paid	Federal Amount	Date Paid	State Amount
2018 1st Qtr Est due 4-15-18				
2018 2nd Qtr Est due 6-15-18				
2018 3rd Qtr Est due 9-15-18				
2018 4th Qtr Est due 1-15-19				

Schedule A- Itemized Deductions	YES	NO
Did you pay any mortgage interest? Please provided documentation for interest paid.		
Did you pay county or city property taxes? Please provide documentation		
Did you incur casualty or theft losses during the year? Personal casualty losses are only deductible if they occur in a declared Federal disaster area. Business casualty losses are deductible.		
Did you have health insurance for the entire year? If no please indicate which months you were covered. If your coverage was through the Marketplace please provide Form 1095 A		
Did you pay premiums for medical or dental insurance out of pocket? Please provide amounts.		
Did you pay premiums for long-term care insurance? Please provide amounts per policy holder.		
Did you or your spouse receive a distribution from a long term care insurance contract?		

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Schedule A-Itemized Deductions Continued	YES	NO
Did you have any medical or dental expenses? Please provide amounts.		
Did you maintain a log for miles traveled for medical purposes? Please provide total miles		
Do you have receipts for any cash or non cash charitable contributions you made? Receipts are required regardless of the dollar amount. If non cash, please provide on a separate sheet name of organization, address, item description, original cost & fair market value.		
For each contribution of clothing and household goods made to a charitable organization valued at an amount of $250 or more, are these items in good condition or better and do you have a receipt substantiating the value of these items?		
Do you have a mileage log for any charitable miles driven?		
Do you have any gambling losses (to the extent of gambling winnings)? Gambling losses need to be substantiated, with the required supporting documentation.		
Schedule B-Interest and Dividend Income		
Did you receive dividend income on shares of stock?		
Did you receive interest income?		
Did you have any tax-exempt income?		
Schedule C-Self-Employment/Business Income and Expenses		
Did you start, continue, or dispose of a business activity during the past year? If yes, please provide a list of your related business income and expenses (including health insurance), any newly acquired business assets or any assets disposed of.		
Did you make any payments of fees and other non-employee compensation, interest, rents, royalties, real estate transactions, annuities, or pensions?		
If yes, did you file all required Form 1099's?		
Did you pay employee wages from a trade or business? If so, please include Forms W-2 and W-3 for the calculation of the wage limit for the new pass-through deduction if applicable.		
Were you or your spouse eligible to be covered under an employer's health plan at another job? If yes, how many months were you covered?		
Did you use any part of your personal residence as a home office?		
Do you have unreimbursed business automobile expenses? Automobile expenses need to be substained with mileage logs for each trip.		
Auto Make, Model & Year:		
Date Placed in Service:		
Total Miles Driven: Total Business Miles Driven:		
Schedule D-Capital Transactions		
Did you sell any type of asset(rental real estate, vacation home, land, securities, bonds, privately held corporations or partnerships, collectibles, etc.) and did not receive a Form 1099-B and/or Form 1099-S? If yes, please attach a statement of cost basis, dates of purchase, date of sale, and sales price.		
Did you receive grants of stock options from your employer, exercise any stock options granted to you, or dispose of any stock acquired under a qualified employee stock purchase plan? If yes, please provide supporting documentation.		
Did you engage in any put or call transactions?		
Did you have any debts canceled, forgiven, or refinanced during 2018?		
Did you trade real property for other real property in a like-kind exchange transaction?		

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Principal Residence Transactions	**YES**	**NO**
Did you refinance a mortgage or take out a home equity loan on your principal residence in 2018?		
Did you use any of the proceeds for any purpose other than improving your principal residence? If so, please provide a detail of what the proceeds were used for.		
Did you refinance your principal mortgage in a **prior year** and use proceeds for any other purpose than improving your principal residence? If so provide supporting documentation.		
Did you sell your principal residence in 2018? If no, go to next section. If yes:		
Did you occupy the home as your principal residence for at least 2 out of 5 years prior to the sale?		
Did you ever rent out this property?		
If the home was acquired prior to May 7, 1997, did you defer the gain from the sale of a prior residence by reinvesting the proceeds within two years?		
Did you ever use any portion of the home for business purposes?		
Have you or a spouse sold a principal residence within the last 2 years? If yes:		
Who owned the principal residence at the time of the sale?		
Schedule E/F Rental or Farm Income and Expenses-Skip if no Rental or Farm Income & Expenses		
Did you purchase, continue or dispose of a rental or farm activity during the past year? If yes, please discuss the matter with us.		
If yes, please provide a list of your related rental or farm revenue and expenses, any newly acquired business assets,and assets that were disposed of in 2018.		
Schedule E Income from S-Corporations, Partnerships or Trust/Estates-if yes need to discuss with us		
Did you purchase, continue or dispose of privately held business activity during the past year in which you have or are to receive a Schedule K-1? If yes, please provide documentation.		
Are you or did you become during the past year a beneficary of a trust or estate in which you have or are to receive a Schedule K-1? If yes, please provide documentation.		
IRA/Pension Contributions and Distributions		
Did you or your spouse withdraw any amounts from your Individual Retirement Account (IRA), Roth IRA, or pension plan?		
If yes, was it to acquire a principal residence or pay for qualified higher education expense?		
If yes, were any distributions from your IRA and/or Roth IRA distributed directly to a charitable organization?		
Did you make a nondeductible contribution to a traditional IRA?		
If yes, please indicate amount contributed:	$	
Did you or your spouse make a contribution to a retirement plan, 401K, SIMPLE, SEP or IRA that is not reported on your W-2 or K-1?		

If yes, indicate the type of plan and the amount contributed:			
Taxpayer's Retirement Plan	Spouse's Retirement Plan		
Contribution Amount: $	Contribution Amount: $		
Did you or your spouse contribute to a Roth IRA?			
If yes, indicate the amount contributed:			
Taxpayer's Contribution Amount: $	Spouse's Contribution: $		
Did you or your spouse convert an existing IRA to a Roth IRA?			
If yes, indicate the amount converted:			
Taxpayer's Conversion Amount: $	Spouse's Conversion Amount: $		
Did you retire or change jobs in 2018?			
Did you receive a retirement or severance compensation?			

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IRA/Pension Contributions and Distributions Continued	YES	NO
Did you or a spouse turn age 70 1/2 (or were older than 701/2) during 2018 and have money in an IRA or other retirement account without taking your required minimum distrubution?		
Energy Credits		
Did you purchase and place in operation to your home in 2018 any of the following:		
Property that uses solar energy to generate electricity for use in a dwelling unit:		
Property that at least half of the energy used by such property for the purpose of heating the dwelling is derived from the sun;		
Property that uses a wind turbine to generate electricity for use in a dwelling unit;		
Property that uses the ground or ground water as a thermal energy source to heat the dwelling unit or as a thermal energy sink to cool such a dwelling unit;		
An intergrated system comprised of a fuel cell stack assembly and associated balance of plant components that converts a fuel into electricity using electrochemical means?		
Do you have manufacturers' tax credit certification statements?		
If so, what were the amounts paid in 2018, INCLUDING labor costs for installation?	$	
Gifts		
Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, etc, with a total aggregate value in excess of $15,000 to any individual during the year?		
Did you or your spouse assist in the purchase of any asset (auto, home, etc) for any individual during the year?		
Did you or your spouse make any gifts to a trust for any amount during the year?		
Education		
Did you or your dependents incur any post-secondary ed Amounts Paid in 2018:		
If yes, indicate the dependent, the type of expense and the amount paid:		
Dependent's name:		
Year of Post-Secondary Education:		
Type of Educational Expenses:		
Did you or your spouse withdraw amounts from a Qualified Education Program (Section 529) or Coverdell Educational Savings Account during 2018 that wasn't used to pay for qualified higher education expenses or for tuition for grades k-12 of a public, private or religious school? (GradesK-12 are limited to $10,000 annually)		
Did you pay any student loan interest?		
Miscellaneous		
Were you or your spouse a grantor or transferor for a foreign trust, have a interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country? If yes, Form TD F 90-22.1 Report of Foreign Bank and Financial Accounts must be filed. Failure to file can result in penalties ranging **from $25,000 to $100,000. It is your responsibility to file this form.**		
Have you provided ALL of your income from ALL sources in your tax documents?		
Have you provided ALL of your deductions? If you are uncertain please provide detail.		

I HAVE READ AND ANSWERED THE ABOVE QUESTIONNAIRE. All unanswered questions will be treated as a "NO" response.

Taxpayer

Spouse(if applicable)