

**PHILIPPS AND BROOKS QUESTIONNAIRE**  
**Please supply us with a copy of your previous year tax return. (NEW CLIENTS ONLY!)**

Taxpayer Name \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_\_\_

Spouse's Name \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_\_\_

Address \_\_\_\_\_

Email \_\_\_\_\_ Home Number \_\_\_\_\_ Cell Number \_\_\_\_\_

**Dependents:**

Name	DOB	SS#

**Driver's License Information:**

	Taxpayer:	Spouse:
License or ID number		
Issuing State:		
Issue Date:		
Expiration Date:		
Document number:		

**Please answer each question by circling Y or N to help us understand your current year tax situation. For every question answered yes, please provide details on the reverse side of this page. If a question does not pertain to you, please circle N.**

1.	Did your marital status change during the year?	Y	N
2.	Name change during the year? If yes, was Social Security notified? Y N	Y	N
3.	Did your address change during the year?	Y	N
4.	Were you a resident or receive income in, more then one state this year? What state?	Y	N
5.	Were there any changes in dependents?	Y	N
6.	Did any of your dependent children under age 18 (24 if college student) have any income?	Y	N
7.	Are you or any dependents blind or disabled?	Y	N
8.	Did you incur any childcare or dependent care expenses?	Y	N
9.	Did you or a dependent reside in assisted living/nursing home during 2018?	Y	N
10.	Did you cash any series EE or I U.S. Savings Bonds that were issued after 1989 and paid for qualified higher education expenses?	Y	N
11.	Did you contribute to a 529 plan? If yes, how much \$_____ What state? _____	Y	N
12.	Did you or any member of your household pay educational expenses for post-secondary education? Do you have any student loan interest?	Y	N
13.	Did you contribute to/receive a distribution from any retirement plan or did you convert retirement funds to a Roth IRA?	Y	N
14.	Did you buy or sell any stocks or bonds in 2018?	Y	N
15.	Did you have any worthless stock in 2018?	Y	N
16.	Did you receive or pay any alimony or separate maintenance payments?	Y	N
17.	Did you or your spouse contribute to or receive a distribution from a Health Savings Account?	Y	N
18.	Did you make cash or non-cash charitable contributions?	Y	N
19.	Did you make any large purchases (vehicle/boat/RV) in 2018? If so, submit copy of sales receipt.	Y	N

21.	Did you make any energy efficient improvements to your home in 2018? If so, please submit details.	Y	N
22.	Did you purchase, sell or refinance your principle residence or 2 <sup>nd</sup> home, or take out a home equity loan?	Y	N
23.	If you sold your home did you claim First Time Home Buyer Credit when you purchased it?	Y	N
24.	Did you have any casualty or theft losses?	Y	N
25.	Do you have a vacation home that was rented to someone else at any time?	Y	N
26.	Did you make any gifts directly or through a trust, which exceeded \$14,000 per person?	Y	N
27.	Did you pay wages of more than \$1,600 to any one household employee?	Y	N
28.	Did you have any interest in, or signature, or other authority over a bank, securities, or other financial account in a foreign country? If yes, did the value of these accounts exceed \$10,000 at any time during the calendar year?	Y	N
29.	During 2018, did you have an interest in a foreign financial account and if so, where?	Y	N
30.	During this past year, did you receive a distribution from or have benefits as a grantor or transferor to a foreign trust?	Y	N
31.	Did you and your dependents have health care coverage for the full year from an employer sponsored plan?  If no, do you have health insurance through NYS Health Insurance Exchange?  If yes, did you receive a subsidy?	Y	N
32.	If you or your spouse are self-employed, did you pay any health or long-term care insurance premiums?	Y	N
32.	Did you receive NYS property tax freeze credit? If yes, enter the amount _____.	Y	N
33.	Did you or anyone in your household receive an Identity Protection PIN? If yes, please provide us with a copy of this notice.	Y	N