

CLIENT QUESTIONNAIRE

TODAYS DATE ____/____/____

WHEN IS A GOOD TIME TO CALL?

NAMES _____

ADDRESS _____ PHONE # _____

EMAIL _____

CHECK IF THE FOLLOWING APPLY DURING **2018**?

<input type="checkbox"/>	WERE YOU SUBJECT TO PMI ON YOUR MORTGAGE?
<input type="checkbox"/>	DID YOU DO ANY ENERGY EFFICIENT IMPROVEMENTS?
<input type="checkbox"/>	DID YOU PAY COLLEGE TUITION FOR YOURSELF OR DEPENDENT?

CHECK IF THE FOLLOWING APPLY DURING **2019**:

- ARE YOU A NEW CLIENT?
- DID YOUR MARITAL STATUS CHANGE
- DO YOU OR YOUR SPOUSE RECEIVE AN IRS PIN DUE TO IDENTITY THEFT?
- DID YOU OR YOUR SPOUSE CONTRIBUTE TO A TRADITIONAL IRA OR ROTH IRA (NOT AN EMPLOYER'S PLAN)?
- DID YOU MAKE ESTIMATED QUARTERLY TAX PAYMENTS, 1040-ES? _____
- IF YOU ARE CLAIMING A DEPENDENT, DID HE/SHE LIVE IN YOUR HOUSEHOLD FOR AT LEAST 6 MONTHS AND 1 DAY?
- IS IT POSSIBLE THAT A DIFFERENT TAXPAYER MIGHT CLAIM YOUR DEPENDENT?
- DID YOU RECEIVE OR PAY ALIMONY/MAINTENANCE?
DATE OF SETTLEMENT _____
- DID YOU ADD OR LOSE ANY OF THE DEPENDENTS LISTED ON YOUR 2018 TAX RETURN?
- DID YOU WITHDRAW MONEY FROM A PENSION PLAN, 401(K), OR IRA?
401K ___ IRA ___ ROTH IRA ___ SIMPLE ___ SEP ___
403B ___ 457 ___ OTHER ___
- DID YOUR DEPENDENT UNDER 13 USE DAYCARE OR SUMMER DAY CAMPS OR AFTER SCHOOL PROGRAMS?
- DID YOU OR SPOUSE TAKE COLLEGE COURSES?
- DID YOU CONTRIBUTE TO A 529 ACCOUNT (COLLEGE FUND)? _____
- DID YOUR DEPENDENT GO TO COLLEGE OR TRADE SCHOOLS?
- DID YOU SELL STOCKS/BONDS/MUTUAL FUNDS OTHER THAN IN AN IRA, 401(K), OR PENSION FUND?
- DID YOU SHORT SALE A PROPERTY, FILE A BANKRUPTCY, OR HAD DEBT FORGIVEN?
- DID YOU PURCHASE OR SELL REAL ESTATE?
- DO YOU HAVE A FOREIGN BANK ACCOUNT?
IS THE ACCOUNT INHERITED? VALUE? _____
- DID YOU INVEST IN A BUSINESS?
- DID YOU SELL E-CURRENCY?
- DID YOU INHERIT REAL ESTATE, STOCKS, BONDS, OR IRAs?
- DO YOU LIVE INSIDE THE CITY LIMITS OF ST LOUIS CITY DURING PART OR ALL OF 2019?
- IF YOU ARE OVER 70, DID YOU PAY A CHARITABLE ORGANIZATION FROM AN IRA
- CONTRIBUTIONS TO CHARITY: CASH _____ NON - CASH _____
- NONE OF THE ABOVE

SIGNATURE _____

QUESTIONS:

DO YOU HAVE ANY QUESTIONS, COMMENTS OR CONCERNS FOR US FOR YOUR 2019 RETURN?

ANY BIG CHANGES REGARDING 2020?
