

2019 Tax Questionnaire

Name: _____

Personal Information

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Can you or your spouse be claimed as a dependent by someone else? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
- Provide proof of identity to be eligible to e-file your tax return (drivers license or state -issued ID)

Dependent Information

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any changes in dependents during the year? If "Yes," explain _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Can another person qualify to claim any dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any childcare expenses during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any adoption expenses during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under the age of 19 or a full-time student under age 24 with more than \$2200 of unearned income? Provide documentation for proof of dependent related credits (school and medical records, daycare records, etc.) |

Health Care Information

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did any member of your household have healthcare coverage thru the Marketplace? If "Yes" provide copies of 1095-A. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year? |

Income, Purchases, Sales, and Debt Information

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any tips not reported to your employer? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any U.S. Savings Bonds during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currencies? (Bitcoin, etc.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any other income not provided with this organizer? If "Yes," explain _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a new business or purchase any rental property during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell an existing business, rental property, or other property during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase any business assets or convert any assets to business use?
If "Yes," provide the cost of the asset, the date it was placed in service, and business use percentage. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase any gasoline, diesel, or special fuels for non-highway business use? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds, or other investments during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell a principal residence during the year? If "Yes," provide closing documentation for the purchase and sale of the home. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a principal residence or a piece of real property foreclosed on during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you abandon a principal residence or a piece of real property during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you refinance your principal home or second home or take out a home equity loan during the year?
If "Yes," provide all escrow, closing, and other pertinent documentation and information. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any principal or interest, during this year, from property sold in prior years? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you rent out your home or use it for business? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell, exchange, or purchase any real estate during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you acquire a new or additional interest in a partnership or S corporation? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts canceled or forgiven this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does anyone owe you money that has become uncollectible? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?
If "Yes," provide the year, make, model, VIN, and date the vehicle was placed in service. |

Retirement Information

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), myRA, or other qualified retirement plan during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any Social Security benefits during the year? |

Foreign Account Information

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any income from, or pay taxes to, a foreign country? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you own property in a foreign country? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year? |



Additional Questions

Yes No

Did you receive income or incur expenses associated with a fantasy sport league? If yes, provide documentation.

Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?

Did you receive income or incur expenses associated with freelancing (e.g., Upwork or Taskrabbitt)?

Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?

If yes to any of the last 3 questions, please provide Form 1099-MISC, 1099-K and/or W-2

Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb or HomeAway)?

If yes, provide documentation

Do you anticipate your income or withholding to be different for 2020?

Use Tax

Do you have any use tax purchases (internet, mail order, etc.) in which sales tax was not charged in 2019? If yes, amount of purchases that did not have sales tax paid. Use tax will be calculated and paid with 2019 OK tax return. \$ _____

Miscellaneous Information

Did you incur loss due to damaged or stolen property?
If "Yes," provide the incident date, value of the property, and amount of insurance reimbursements.

Did you pay \$2,100 to any household employees (babysitter, nanny, housekeeper, etc.)?

Did you make any gifts to any one person in excess of \$15,000 during the year?

Did you incur moving expenses during the year?

Did you make any energy-efficient improvements to your main home during the year?

Are you a business owner and paid health insurance premiums for your employees during the year?

Did you apply an overpayment of your 2018 taxes to your 2019 estimated taxes?

If you have an overpayment of 2019 taxes, do you want the refund applied to your 2020 estimated taxes?

Did you make any estimated payments toward your 2019 taxes? If yes, include the amounts and dates paid.

Do you want to have any refund or balance due directly deposited or withdrawn?

If "Yes," provide a canceled checking or savings slip. (If different from prior year)

Did you receive any notices from the IRS or state taxing authority? If yes, explain _____

May the IRS discuss your tax return with your preparer?

Itemized Deduction Information

Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?

Did you pay any long-term premiums for you, your spouse, or a dependent during the year?

Did you receive any state or local income tax refunds from prior years?

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

Did you pay any real estate property taxes or personal property taxes during the year?

Did you have gambling winning or losses during the year?

Did you have any job related expenses that were not reimbursed by your employer (uniforms, safety equipment, etc.)?

Do you use your vehicle on the job other than for commuting to work?

Did you work out of town anytime during the year?

Did you pay mortgage interest during the year?

Did you make cash donations to charity during the year? SEE NOTE BELOW

Did you make non-cash donations to charity (clothes, furniture, etc.) during the year? SEE NOTE BELOW

Did you donate a boat or vehicle during the year? If "Yes," attach Form 1098-C.

NOTE: Any contributions (cash or non-cash) of \$250 or more are required to obtain dated acknowledgement from charity including this phrase 'no goods or services were provided in exchange for your contribution'.

Education Information

Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?

Did anyone in your household attend a post-secondary school during the year?

Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition program?

Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?

Planning Notes

Do you have an Advance Directive?

Make sure all of your beneficiaries are up to date (Beneficiaries on Life Insurance & IRA's will override a Will or Trust)

Have you started reviewing and planning for retirement? (The earlier the better)

Client Signature

Date