

NAME: _____

PLEASE ANSWER ALL QUESTIONS TO THE BEST OF YOUR ABILITY & INCLUDE ALL NECESSARY DETAILS & DOCUMENTATION	YES	NO
Personal Information	YES	NO
Did your marital status change during the year? If yes, explain: _____		
Did your address change from last year?		
Can you be claimed as a dependent by another taxpayer?		
Did you change bank accounts that have been used to direct deposit (or direct debit) funds from any taxing authority?		
Dependent Information		
Were there any changes in dependents from the prior year? If yes, explain: _____		
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,500?		
Do you have dependents who must file a tax return?		
Did you provide over half the support for any other person(s) other than your dependent children during the year?		
Did you pay for child care while you worked or looked for work?		
Did you pay any expenses related to the adoption of a child during the year?		
If divorced/separated with child(ren), do you have a divorce decree or other form of separation agreement?		
Purchases, Sales and Debt Information	YES	NO
Did you start a new business or purchase rental property during the year?		
Did you acquire a new or additional interest in a partnership or S corporation?		
Did you sell, exchange, or purchase any real estate during the year?		
Did you purchase or sell a principal residence during the year?		
Did you foreclose or abandon a principal residence or real property during the year?		
Did you acquire or dispose of any stock during the year?		
Did you take out a home equity loan this year?		
Did you refinance a principal residence or second home this year?		
Did you sell an existing business, rental, or other property this year?		
Did you incur any non-business bad debts this year?		
Did you have any debts canceled or forgiven this year, such as home mortgage or student loans?		
Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?		
Did you pay any student loan interest this year?		
Income Information	YES	NO
Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly?		
Did you receive any income from property sold prior to this year?		
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?		
Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?		
Did you make any withdrawals from an education savings or 529 Plan account?		
Did you receive any distributions from a Health savings account (HSA), MSA, or Medicare Advantage MSA this year?		
Did you receive any Social Security benefits during the year?		
Did you receive any unemployment benefits during the year?		
Did you receive any disability income during the year?		

CONTINUED (OVER)

Income Information Continued	YES	NO
Did you receive tip income not reported to your employer this year?		
Did any of your life insurance policies mature, or did you surrender any policies?		
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?		
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?		
Do you expect a large fluctuation in income, deductions, or withholding next year?		
Itemized Deduction Information	YES	NO
Did you incur a casualty or theft loss or any condemnation awards during the year?		
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?		
Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? If yes, please provide evidence		
Did you donate a vehicle/boat during the year? If yes, provide Form 1098-C or other written acknowledgement		
Did you have an expense account or allowance during the year?		
Did you use your car on the job, for other than commuting?		
Did you work out of town for part of the year?		
Did you have any expenses related to seeking a new job during the year?		
Did you make any major purchases during the year (cars, boats, etc.)?		
Did you make out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?		
Miscellaneous Information	YES	NO
Did you make gifts of more than \$14,000 to any individual?		
Did anyone in your family receive a scholarship of any kind during the year?		
Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent?		
Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan		
Did you make any contributions to an education savings or 529 Plan account?		
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act?		
Did you make any contributions to a Health savings account (HSA) or Archer MSA?		
Did you pay health care or long-term care premiums for yourself or your family?		
Did you pay any COBRA health care coverage continuation premiums?		
If you are a business owner, did you pay health insurance premiums for your employees this year?		
Did you utilize an area of your home for business purposes?		
Did you engage in any bartering transactions?		
Are you an active participant in a pension or retirement plan?		
Did you retire or change jobs this year?		
Did you incur moving costs because of a job change?		
Did you, your spouse, or your dependents attend a post-secondary school this year?		
Did you pay any individual as a household employee during the year?		
Did you receive correspondence from the State or the Internal Revenue Service? If yes, explain: _____		
Did you receive an Identity Protection PIN from the IRS regarding identity theft? If yes, provide the IRS letter.		
Designate \$3 to the Presidential Election Campaign Fund? Checking yes will not change your tax or reduce your refund.		