

**YOU'LL NEED TO COMPLETE THIS AND BRING OR MAIL FOR
YOUR APPOINTMENT**

NAME _____ DATE _____

DID YOU RECEIVE A STIMULUS PAYMENT? Y__ N__ AND HOW MUCH _____

PLEASE CHECK ALL QUESTIONS THAT APPLY & INCLUDE ALL NECESSARY DETAILS & DOCUMENTATION

Personal Information—Check all that apply

Changes in: Marital Status __ Address __ Dependents __ Bank Account for Direct Deposit __

You are claimed as a dependent on someone else's return __ Paid for daycare __

Purchases, Sales and Debt Information—Check all that apply

Purchased interest in a business, rental property, partnership or corporation __

Sold, exchanged, property __, stock __, business __

Refinanced property __, Took a 2nd Mortgage or Equity line of credit __

Had debt cancelled by mortgage co. __, credit card __, personal loan __

Income Information-Check all that apply

I have Foreign Bank accounts __ Withdrew from IRA __, Pension __, 401K __, other retirement __

Withdrew from Education Accounts __, Health Savings account __, Received Social Security __,

Unemployment __, Disability __, Unreported Tips __, Gambling or Lottery Winnings __

Deduction Information– Check all that apply

Had a loss of property or money __, Paid out of pocket medical expenses __, Purchased a vehicle __,

Paid contributions to charity by cash or check __, Gave used items to charity __, Donated a Vehicle __

Had unreimbursed employment related expenses __ (note: these apply to the state only)

Had Education expenses __, Received Scholarship __, Paid student loan interest __,

Made Contributions to Traditional IRA __, Roth IRA __, other personal retirement plan __

Made out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax __

Miscellaneous Information

Gave an individual more than \$15,000 __, Paid a household employee __

Enrolled in lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act __

Received correspondence from the State or the Internal Revenue Service __ Received IRS PIN __

Designate \$3 to the Presidential Election Campaign Fund Yes __ (will not change your tax or reduce your refund) No __