



## Individual Tax Return Questionnaire – 2016 Tax Year

Submit your completed and signed Individual Tax Questionnaire along with any additional tax information using one of the following methods:

- Upload your information electronically through our secure file transfer server at: <http://neighborhoodcpa.leapfile.net>
- Mail/deliver to 15303 Huebner Road, Bldg 9, San Antonio, TX 78248

**PERSONAL INFORMATION**

Name: \_\_\_\_\_

Filing status or dependent changes? \_\_\_\_\_

Update contact information: \_\_\_\_\_

For verification purposes, please provide the last four digits of the bank account used for direct deposit. \_\_\_\_\_

If your bank account information has changed, please provide us with a voided check.

If we can't file your tax return by the original due date, do we have your permission to file an extension? \_\_\_\_\_ Yes \_\_\_\_\_ No

Please indicate how you would like to receive your tax return copy: \_\_\_\_\_ Secure Email \_\_\_\_\_ Printed Copy

QUESTIONS	Yes	No	QUESTIONS	Yes	No
Did you have an interest in, or signature authority over a foreign financial account or have financial accounts/assets/interests maintained or issued by a foreign entity?			Did you pay any individual, NOT holding themselves out as a business, more than \$2,000 for household services during the year, such as cleaning, cooking, healthcare or childcare?		
Do you have any tax filing requirements in another state and/or country? List: _____			Do you have a home equity loan? If so, who is the loan with? _____		
Have you ever received any correspondence from the IRS or paid any fines/penalties to them that have not been brought to our attention?			Did you purchase, sell, or refinance your home? Circle all that apply and attach the HUD Settlement and Closing Disclosure.		
Did you receive any non-taxable income? List: _____			Have you read the charitable substantiation rules and maintained the appropriate documentation?		
Did you know that the first original Form 1040 was due on March 1, 1913?			Did you contribute to an IRA? If so, how much? Circle: IRA - Roth - SEP - Company Plan		
Did you have any debt forgiven or file for bankruptcy?			Did your employer grant any stock options to you or did you exercise any stock options?		
Did you make gifts (cash or property) in excess of \$14,000 to any individual during the year?			Did you have health insurance coverage for the entire year? How many months if less than 12? _____		
Do any of your dependent children have unearned income over \$1,050?			Did a dependent file a return for 2016? If so, please provide a copy of their return.		
Did you pay sales tax on the purchase of a vehicle, boat, motorcycle or certain construction costs?			Did you make any qualified residential energy improvements to your home?		

### HEALTH INSURANCE COVERAGE

**The IRS requires that you report certain information related to your health care coverage on your 2016 tax return. Please read the following statements carefully. More than one might apply to your "tax family". Health insurance providers have until March 2 to issue Form 1095-Bs and 1095-Cs. If you have not received these forms yet, please provide other proof of coverage.**

1. If you had health care coverage with a government Marketplace (Exchange) during 2016, please provide Form 1095-A. If you had compliant health insurance through an employer plan, private policy or with a government plan, please provide Form 1095-B and/or 1095-C.
2. If you are claiming someone on your return who was included on another taxpayer's policy with a Marketplace, you will also need to provide a copy of that taxpayer's Form 1095-A.
3. If you were issued a hardship exemption by the Marketplace (Exchange), provide all applicable exemption certificates and numbers issued for each member of your family.

Signature \_\_\_\_\_ Date \_\_\_\_\_