



Individual Tax Return Questionnaire – 2017 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:
<https://www.clientaccess.com/sharesafe/#/bwccpa>
- Mail/deliver to 15303 Huebner Road, Bldg 9, San Antonio, TX 78248. Our office now has a secure drop box for after hour drop offs.

PERSONAL INFORMATION

Name: _____
Address: _____
Primary telephone: _____ Secondary telephone: _____
Email addresses: _____
Filing status or dependent changes? _____
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/or 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 only 4 pages, including instructions?			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? _____ Please attach a copy of all your Form(s) 1095.		
Do any of your dependent children have unearned income over \$2,100?			Did a dependent file a return for 2017? 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?		

Affordable Care Act:

If you or a family member enrolled in health insurance through the Marketplace and advance payments of the premium tax credit were made to your insurance company to reduce your monthly premium payment, you must provide us with a copy of your Form 1095-A. The Marketplace is required to send Form 1095-A by January 31, 2018.

If you or someone in your family had health coverage from a provider other than the Marketplace in 2017, the provider of the coverage is required to send you a Form 1095-B or 1095-C by March 2, 2018.

Signature _____ Date: _____