

TAX INFORMATION QUESTIONNAIRE

PLEASE INCLUDE THIS COMPLETED QUESTIONNAIRE WITH YOUR TAX INFORMATION

Client Name _____

Date of birth: _____

Spouse Name: _____

Date of birth: _____

	Yes	No
Personal Information		
Did your marital status change during the year?	•	•
If yes, nature of change: _____ Divorced _____ Married _____ Widowed		
Did your address change from last year?	•	•
Do you use email? If yes, may we have your email address? _____	•	•
Can you be claimed as a dependent by another taxpayer?	•	•
Did you change any bank accounts that have been used to direct deposit (or direct debit?) funds from (or to) the IRS or other taxing authority during the tax year?	•	•
Dependent Information		
Were there any changes in dependents from the prior year?	•	•
Is yes, explain: _____		
Are you entitled to a dependency exemption due to a divorce decree?	•	•
Do you have any children under age 19 (or 24 if full time student) with unearned income in excess of \$1,900?	•	•
Did any of your dependents have earned income of \$950 or more?	•	•
If yes, they may need to file their own return.		
Did you incur expenses related to the adoption of a child that became final during the year?	•	•
Income Information		
Did you have W-2 income this year? If yes, please include all W-2 forms	•	•
Did you have any interest or dividend income this year?	•	•
If yes, please include all 1099-INT and 1099-Div Forms		
Did you make any withdrawals from an IRA, Keogh, SIMPLE, or SEP account?	•	•
If yes, please include all 1099-R forms		
Did you sell any stocks/bonds during the year? If yes, please include all 1099-B forms	•	•
Did you operate your own business this year?	•	•
If yes, please include a list of all income and expenses for the year		
Did you receive Social Security benefits during the year?	•	•
If, yes please include all 1099-SSA forms		
Did you receive any unemployment compensation? If yes, please include 1009-G forms	•	•
Did you receive alimony during the current tax year?	•	•
If yes, how much did you receive? _____		
Did you own any rental property this year?	•	•
If yes, please include a listing of all rental income and expenses for the year		
Did you own/operate a farm this year?	•	•
If yes, please include a listing of all income and expenses for the year		
Did you receive any Schedule K-1's this year? If yes, please include		
Did you receive any disability income during the year?	•	•
Did you make any IRA (Roth/Regular) contributions this year? If yes, please provide information	•	•
If you or your spouse have self-employment income, do you want to make contributions to an existing retirement plan, or set up a new retirement plan?	•	•
Did you pay any student loan interest this year? If yes, please provide amount \$ _____		
Does your employer offer a Health Savings Account?	•	•
If yes, please list the amount of any pre-tax contributions \$ _____		

	Yes	No
Did you receive any distributions from a Health Savings Account (HSA), Archer MSA or Medicare Advantage this year?	•	•
If you or your spouse has self-employment income, did you pay any health insurance premiums?	•	•
If yes, were either you or your spouse eligible to participate in any company-sponsored health insurance plan? Please provide premium information. Including amount paid.	•	•
Did you pay alimony during the current tax year?	•	•
If yes, please provide recipient's name, social security number and amount paid to them.		
Did you move because of a job change this year?	•	•
If yes, please provide a listing of moving expenses		
Did you receive any additional income not listed previously?	•	•
If yes, please include all documentation regarding income.		
Are you a K-12 teacher with un-reimbursed job expenses?	•	•
If yes, how much? _____		
Did you cash or surrender any Series EE or I U.S. Savings Bonds issued after 1989?	•	•
If yes, did you use any of the proceeds to pay for higher education expenses?	•	•
Did you make a withdrawal from a 529 plan or an IRA to pay for education expenses?	•	•
Did you have any foreign income or pay any foreign taxes during the year?	•	•
Did you receive any installment payments from property sold prior to this year?	•	•
Did you receive tip income not reported to your employer?	•	•
Did you receive any lump-sum payment from a pension, profit sharing or 401(k) plan?	•	•

Itemized Deduction Information

Did you incur any unreimbursed medical expenses this year? If yes, please provide a list	•	•
Did you pay any premiums for Medical Insurance?	•	•
If yes, how much (after tax contributions) _____		
Did you pay any premiums for Long Term Care Insurance?	•	•
If yes, how much _____		
Did you pay real estate taxes during the year? If yes, please provide the amount.	•	•
Did you pay mortgage interest during the year? If yes, please provide all 1098 Forms	•	•
Did you make cash charitable contributions during the year?	•	•
If yes, please provide the amount paid \$ _____		
Did you make any non-cash charitable contributions (clothes, furniture, etc)?	•	•
If yes, please list the contribution amount \$ _____		
Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C	•	•
Do you have evidence to substantiate charitable contributions?	•	•
Did you pay any union dues during the current year? Is yes, please provide the amount \$ _____		
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 make any major purchases during the year (cars, boats, etc)?	•	•
Did you make any out of state internet/phone purchases that the seller did not collect sales or use tax?	•	•
Did you have any expenses related to seeking a new job during the year?	•	•
Did you incur a casualty or theft loss during the year?	•	•

Purchases, Sales and Debt Information

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?	•	•
If yes, please include a copy of the real estate closing statements.		
Are you a first time homebuyer who purchased after 01/01/09?	•	•
Did you foreclose or abandon a principal residence during the year?	•	•
Did you take out a home equity loan this year?	•	•
Did you sell an existing business, rental, or other property this year?	•	•

	Yes	No
Did you incur any non-business bad debts this year?	•	•
Did you have any debts canceled or forgiven this year?	•	•
Did you purchase gasoline or other fuels for off-highway use (e.g., farming)?	•	•
Did you purchase a hybrid, alternative motor or electric motor energy efficient vehicle this year? If yes, please provide information on vehicle.	•	•

Miscellaneous Information

Did you make gifts of more than \$13,000 to any individual? If yes, a gift tax return may be required.	•	•
Did you have any educational expenses during the year (for you or a dependent)? If yes, please provide 1098-T Forms	•	•
Did you make energy efficient improvements to your home during the current tax year? If yes, please provide information	•	•
Did you engage in any bartering transactions?	•	•
Did you pay any household employee wages of \$1,600 or more?	•	•
Did you have any worthless securities or any loans that became uncollectable? If yes, please explain: _____	•	•
Did you pay any premiums for COBRA health care coverage continuation premiums? If yes, how much _____	•	•
Are you an active participant in a pension or retirement plan?	•	•
Were you a grantor or transferor for a foreign trust, have an interest in or a signature of other authority over a bank account, securities account, or other financial account in a foreign country?	•	•
Did you pay childcare expenses that enabled you to work or attend school?	•	•
Did you receive correspondence from the State or the Internal Revenue Service? If yes, explain: _____	•	•
Do you want to allocate \$3 to the Presidential Election Campaign Fund?	•	•
If you are an Ohio resident, did you make any political contributions to candidates for <u>statewide</u> office (legislature, governor, etc.)? If yes, please provide amount contributed.	•	•
May we act as your power of attorney with the IRS regarding your current year tax return?	•	•
Would you like part of your Ohio Refund to be donated to Nature Preserves or Wildlife? If yes, what amount would you like donated to Nature Preserves \$ _____ Endangered Wildlife \$ _____	•	•
Did you make contributions to an Ohio 529 plan during the current tax year? If yes, please provide contribution information? \$ _____	•	•

Did you make estimated tax payments for the current tax year? • •

If yes, please list below:

Federal:

Date Paid _____	Amount Paid _____
Date Paid _____	Amount Paid _____
Date Paid _____	Amount Paid _____
Date Paid _____	Amount Paid _____

State:

Date Paid _____	Amount Paid _____
Date Paid _____	Amount Paid _____
Date Paid _____	Amount Paid _____
Date Paid _____	Amount Paid _____

School District or City (circle):

Date Paid _____	Amount Paid _____
Date Paid _____	Amount Paid _____
Date Paid _____	Amount Paid _____
Date Paid _____	Amount Paid _____

**In accordance with state mandates, we will be filing your returns electronically this year.
To opt out of electronic filing, you must notify us when dropping off/mailing your information to us.**