



## 2018 Personal Tax Questionnaire

**Please return this questionnaire with copies of any 2018 tax documents you have already gathered and can assume that we need for this year’s filing: W2s, 1099s, Mortgage Interest Statement, Profit & Loss reports, etc.**

**Also provide a copy of your 2017 tax return if we don’t already have it. Your 2017 return is the starting point for preparation of 2018.**

**We may request additional information after our initial review of your documents and your answers on this questionnaire.**

### Personal Info and Contact

	Primary Taxpayer	Spouse
First Name and Initial		
Last Name (& suffix)		
Social Security Number		
Occupation		
Date of Birth		
Driver’s License (state & number)		
Primary Phone		
Alternate phone		
Email Address		
Preferred Contact Method		
Address ---->		

### Dependents

	Dependent 1	Dependent 2	Dependent 3
Full Name			
Date of Birth			
Social Security Number			
Relationship			
Months lived with you			

- If you have more than 3 dependents, please provide info on a separate sheet of paper.

## 2018 Filing Update Questions

Please answer yes or no to the following questions.

### PERSONAL INFO:

Yes    No

- 1) Did your marital status change during 2018?
- 2) Did your address change during 2018?
- 3) Can you or your spouse be claimed as a dependent on someone else's return for 2018?
- 4) Were you a victim of identity theft or identity fraud in 2018?
- 5) Did your bank info change for 2018? (for automatic refund purposes)

### DEPENDENTS:

- 6) Were there any changes in dependents for 2018?  
A valid Social Security card is needed for any new dependents.
- 7) Are you claiming any unmarried children who were over the age of 19 at the end of 2018?
- 8) If yes to #7, was the child (or children) a full-time student under the age of 24 in 2018?
- 9) Did you pay for childcare for any of your dependent children in 2018?

### HEALTH CARE COVERAGE:

- 10) Did everyone in your household have healthcare coverage for all 12 months of 2018?
- 11) Did you receive a form 1095 (-A, -B, or -C) verifying health care coverage for 2018?
- 12) If you or your dependents did not have health care coverage for all or part of the year, do you have an exemption?

### INCOME:

- 13) Did you or your spouse change employers in 2018?
- 14) Did you or your spouse have any self-employment income in 2018?
- 15) Did your household receive or pay any alimony or child support in 2018?
- 16) Did you or your spouse receive unreported income or unreported tips 2018?
- 17) Did you or your spouse cash in any Series EE bonds 2018?
- 18) Did you or your spouse receive Social Security or Disability income in 2018?
- 19) Did you or your spouse receive foreign income or pay any foreign taxes in 2018?
- 20) Do you or your spouse have any interest in, or signature, or other authority over a financial Account in a foreign country?

**INCOME Cont...**

Yes    No

- 21) Did you or your spouse sell any stocks, bonds, mutual funds or other financial instruments in 2018 that were NOT held in a qualified retirement plan such as an IRA, 401K, etc... ?
- 22) Did you or your spouse receive interest income in 2018, from a bank or other source?
- 23) Did you or your spouse receive income from a Trust or Estate in 2018?
- 24) Did you or your spouse buy or sell any cryptocurrency, such as BitCoin, in 2018?
- 25) Did you or your spouse have a debt cancelled or forgiven in 2018 and receive form 1099-C?
- 26) Did you or your spouse receive any rental income in 2018?
- 27) Did you or your spouse give or receive any gifts valued at more than \$15,000 in 2018?
- 28) Did you or your spouse have any gambling, gaming or lottery winnings in 2018?

**BUSINESS & ASSETS:**

- 29) Did you or your spouse start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S-corp, trust or REMIC in 2018?
- 30) Did you or your spouse purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.) or convert any personal assets to business use in 2018?
- 31) Did you purchase, sell, or refinance your principle home or second home in 2018?
- 32) Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal, or fuel cell energy sources in 2018?
- 33) Did you suffer any significant property loss from theft or natural-disaster in 2018?
- 34) Do you have any business accounts receivables that you determined to be uncollectable in 2018?
- 35) Did you or your spouse keep a business mileage log in 2018?

**RETIREMENT PLAN:**

- 36) Did you or your spouse contribute to an employer sponsored retirement plan in 2018?
- 37) Did you or your spouse make any contributions to a non-employee retirement plan in 2018?
- 38) Did you or your spouse receive any distributions from a retirement plan in 2018?
- 39) Did you or your spouse transfer or rollover any retirement funds from one plan to another in 2018?
- 40) Did you or your spouse convert all or part of a non-ROTH IRA to a Roth IRA in 2018?

**EDUCATION:**

- 41) Did you or your spouse receive any distributions from an Education Savings Account or Qualified Tuition Program in 2018?
- 42) Did you, your spouse, or any dependent pay tuition or educational expenses required to attend a college, university or vocational school in 2018?
- 43) Did you or your spouse pay student loan interest in 2018?

**ITEMIZED DEDUCTIONS:**

- 44) Did you, your spouse, or dependents have any large medical or dental expenses in 2018?
- 45) Did you pay mortgage interest on a first or second home in 2018?
- 46) Did you pay property taxes or sales tax on a major purchase (car, RV, boat, etc.) in 2018?
- 47) Did you make any charitable donations in 2018?

**OTHER DISCUSSION ITEMS:**

In the space below, briefly list any other 2018 tax items or issues that may not have been on this questionnaire or that you'd like to discuss. BE BRIEF HERE! If you'd like to write out a longer explanation or question set, please do so through email or in a separate document.

The information contained in the questionnaire above and any other supplied documents is true, complete and correct to the best of my (our) knowledge.

\_\_\_\_\_  
Primary Taxpayer:

\_\_\_\_\_  
Spouse:

\_\_\_\_\_  
Date