

# 2016 TAX QUESTIONNAIRE

**Client name:** \_\_\_\_\_

**Please check the appropriate box, and provide an answer to each question.**

YES	NO

**Personal Information**

Did your marital status change during the year? If yes, explain: \_\_\_\_\_  
 Did your mailing address change during the year?  
 Can you or your spouse be claimed as a dependent by another taxpayer?

YES	NO

**Dependent Information**

Were there any changes in dependents from the prior year?  
 -If yes, explain: \_\_\_\_\_  
 Did you have any childcare expenses during the year?

YES	NO

**Health Care Information**

Did any member of your household NOT have healthcare coverage for the entire year?  
 Provide copies of all forms 1095-A, 1095-B, 1095-C for ALL member of your household.  
 If any member received an exemption from the marketplace, provide the Exemption Certificate Number (ECN) \_\_\_\_\_  
 Did you receive any distributions from a Health Savings Account (HAS), or Medicare Advantage MSA during the year?

YES	NO

**Income, Purchases, Sales and Debt Information**

Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?  
 Did you have any income from, or pay taxes to, a foreign country?  
 Did you receive any tips not reported to your employer?  
 Did you receive any disability income during the year?  
 Did you cash any U.S savings bonds during the year?  
 Did you foreclose or abandon a principal residence or real property during the year?  
 Did you refinance your principal home or second home or take out a home equity loan during the year?  
 Did you receive any principal or interest, during this year, from property sold in prior years?  
 Did you rent out your home or use it for business?  
 Did you sell, exchange, or purchase any real estate during the year?  
 Did you have any debts canceled or forgiven this year?  
 Did you receive tips, gambling winnings (Form W-2G), royalties, prizes, or jury duty pay? ( Form 1099 MISC)

YES	NO

**Itemized Deduction Information**

Did you pay any long-term healthcare premiums for yourself, your spouse, or a dependent during the year?  
 Did you make any larger purchases (Vehicle, boats, etc.) during the year?  
 Did you donate a boat or vehicle during the year? If yes, include form 1098-C in your documents.  
 Did you have any job-related expenses that were not reimbursed by your employer (uniforms, safety equipment), etc?  
 Did you work out of town during the year?  
 Did you have gambling losses during the year?

YES	NO

**Retirement Information**

Did you receive any payments from a pension, profit sharing, or 401(k) plan this year?  
 Did you make withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k)  
 Did you receive any Social Security benefits during the year?

YES	NO

**Education Information**

Did you pay tuition expenses that were required for attending college, university, or vocational  
 -school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?  
 Did anyone in your household attend a post-secondary school during the year?  
 Did you pay student loan interest of yourself, your spouse, or your dependent(s) during the year?

YES	NO

**Miscellaneous Information**

Did you incur a loss due to damaged or stolen property?  
 Did you pay wages to any household employees (Babysitter, nanny, housekeeper), etc?  
 Did you make energy-efficient improvement to your main home during the year?  
 If you have an overpayment of 2016 taxes, do you want the refund applied to your 2017 estimated taxes?  
 Did you make any estimated payments toward your 2016 taxes?  
 Did you receive any notices from the IRS or state taxing authority?  
 Would you like to have your refund direct deposited (PROVIDE voided check for account info)

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