

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: _____
- Can you or your spouse be claimed as a dependent by someone else?
- Did your address change during the year?
- Provide proof of identity to be eligible to e-file your tax return (driver's license or state issued ID)

YES	NO

Dependent Information

- Did you have any changes in dependents during the 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** members of your household.
- If any member received an exemption from the marketplace, provide the Exemption Certificate Number (ECN) _____
- Did you receive a distribution from a Health Savings Acct., Archer MSA ,or Medicare Advantage MSA during the year?

YES	NO

Income, Purchases, Sales and Debt Information

- Did you have a financial interest 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 own property in 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 receive any other income such as Gambling Winnings or Jury Pay?

-If yes, explain: _____

- Did you start a new business, or close a business this year?
- Did you purchase any gasoline, diesel, or special fuels for non-highway business use?
- Did you buy or sell any stocks, bonds, or other investments during the year?
- Did you sell a principal residence during the year?

-If yes, provide closing documentation for the purchase and sale of the home.

- Did you foreclose or abandon a principal residence or other property during the year?
- Did you refinance your principal home or second home or take out a home equity loan during the year?

-If yes, provide all escrow, closing, and pertinent documentation and information.

- Did you receive any principal or interest during this year from property sold in prior years?
- Did you sell, exchange or purchase any real estate during the year?
- Did you have any debts canceled or forgiven this year?
- Did you purchase a new hybrid or electric motor vehicle during the year?

-If yes, provide the year, make, model, VIN, and date the vehicle was placed in service.

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Itemized Deduction Information

- Did you pay any long-term healthcare premiums for yourself, your spouse, or a dependent during the year?
- Did you receive any state or local income tax refunds from prior years?
- Did you make any major purchases (vehicle, boat, etc.) during the year?
- Did you make cash donations to charity during the year?
- Did you make non-cash donations to charity (clothes, furniture, etc.) during the year?
- Did you donate a boat or vehicle during the year?

-If yes, attach Form 1098-C.

- Did you have any job-related expenses that were not reimbursed by employer (uniforms, safety equipment)?
- Did you use your vehicle on the job other than for commuting to work?
- Did you have any 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: IRA, Roth, Keogh, SIMPLE, SEP, 401(k), myRA, etc qualified retirement plan during the year?
- Did you receive any Social Security benefits during the year?

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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 make a contribution, or receive a distribution from an Education Savings or Qualified Tuition Program this 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 moving expenses due to a change in employment?
- Did you make energy-efficient improvements to your main home during the year?
- Did you apply an overpayment of your 2016 taxes to your 2017 estimated taxes?
- If you have an overpayment of 2017 taxes, do you want the refund applied to your 2018 estimated taxes?
- Did you make any estimated payments toward your 2017 taxes?
- Did you want to have any refund or balance due directly deposited or withdrawn?

-If yes, provide a canceled checking or savings slip.

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- Did you receive any notices from the IRS or state taxing authority?

-If yes, explain: _____

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- Would you like a copy of your tax return emailed to you instead of receiving a printed copy?