

2018 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 address change during the year?

YES	NO

Dependent Information

Did you add or lose any dependents during the year?

-If yes, explain: _____

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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?

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 earn any income from a state other than where you currently live?

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 sell, exchange or purchase any real estate during the year?

-If yes, provide closing documentation for the purchase or sale of the property.

Did you foreclose or abandon a principal residence or other property during the year?

Did you refinance your principal 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 have any debts canceled or forgiven this year?

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Did you inherit any property or were the beneficiary of any inherited retirement accounts?

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YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Itemized Deduction Information

Did you pay any long-term (Nursing Home) healthcare premiums during the year?

Did you receive any state or local income tax refunds from prior years?

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.

<input type="checkbox"/>	<input type="checkbox"/>
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Did you have any gambling losses during the year?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

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, SIMPLE, SEP plan, (Other than a 401k)?

Did you receive any Social Security benefits during the year?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

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)?

<input type="checkbox"/>	<input type="checkbox"/>
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Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?

YES	NO
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Miscellaneous Information

Did you apply an overpayment of your 2017 taxes to your 2018 estimated taxes?

If you have an overpayment of 2018 taxes, do you want the refund applied to your 2019 taxes?

Did you make any estimated payments toward your 2018 taxes?

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

Would you like any tax refunds directly deposited into your bank?

If yes, please provide a voided check for the account you want to receive the refund.

This is not intended to be an all inclusive list.

Additional questions may arise during the preparation of your returns.

Please assist us by submitting any additional documents and information you feel may be helpful.

Hours beginning late January 2019, M-W-F, 8:00 to 5:00, T-TH 8:00 – 8:00, SAT 8:00 to 12

Phone: 301-473-4445 Email: frontdesk@jgeorgecpa.com