

PLEASE UPDATE ALL CONTACT INFORMATION

CLIENT NAMES: _____

Preferred Communications Method:

Telephone/ E-Mail (PLEASE MARK ONE)

His E-Mail Address _____ Her E-Mail Address _____

Telephone No's: Home: _____

His Work: _____ /Her Work: _____

His Cell: _____ /Her Cell: _____

Please indicate preferred contact method (e-mail or phone) with an "X" in the box above

Please answer all questions by checking the appropriate box and include all necessary details and documentation.
(You can make notes to the side of any questions)

Yes No

Personal Information

- () () Did your marital status change during the year?
If yes, explain and give dates: _____
- () () Did your address change from last year? New address _____
- () () Can you be claimed as a dependent by another taxpayer?
- () () Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change from existing 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?
Please provide us a check copy or account statement and bank routing number again to re-verify per IRS.
- () () Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of Identity Theft? If yes, attach the IRS letter.
- () () Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include hurricane and tropical storm victims in Georgia, Florida, Puerto Rico, the Virgin Islands and parts of Texas, Louisiana and South Carolina, as well as wildfire victims in California.

Dependent Information

- () () Were there any changes in dependents from the prior year?
If yes, explain: _____
- () () Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,100?
- () () Do you have dependents who must file a tax return?
- () () Did you provide over half the support for any other person(s) other than your dependent children during the year?
- () () Did you pay for child care while you worked or looked for work or while a full-time student?
- () () Did you pay any expenses related to the adoption of a child during the year?
- () () If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?
- () () Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of Identity Theft? If yes, attach the IRS letter

Purchases, Sales and Debt Information

- () () Did you start a new business or purchase rental property during the year?
- () () Did you sell, exchange, or purchase any assets used in your trade or business?
- () () 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?
- () () Did you purchase or sell a principal residence during the year?
- () () Did you foreclose or abandon a principal residence or real property during the year?
- () () Did you acquire or dispose of any stock during the year?
- () () Did you take out a home equity loan this year?
- () () Did you refinance a principal residence or second home this year?
- () () Did you sell an existing business, rental, or other property this year?
- () () Did you lend money with the understanding of repayment and this year it became totally uncollectable?

Yes No

- Did you have any debts canceled or forgiven this year, such as home mortgage, student loans, or credit cards?
 Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?

Income Information

- Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as investment accounts or partnerships or a foreign employer?
 Did you receive any income from property sold prior to this year?
 Did you receive any unemployment benefits during the year?
 Did you receive any disability income during the year?
 Did you receive tip income not reported to your employer this year?
 Did any of your life insurance policies mature, or did you surrender any policies?
 Did you receive any awards, prizes, hobby income, gambling or lottery winnings?
 Do you expect a large fluctuation in income, deductions, or withholding next year?
 Did you have any sale or other exchanges of virtual currencies, or used virtual currencies to pay for goods or services, or you are holding virtual currencies as an investment?

Retirement Information

- Are you an active participant in a pension or retirement plan?
 Did you receive any Social Security benefits during the year?
 Did you make any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?
 If yes, were any withdrawals due to a Federally declared disaster?
 Did you receive any lump-sum payments from a pension, profit sharing or 401 (k) plan?
 Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?
 Did you or your spouse turn age 70 ½ this year?
 If you or your spouse are over age 70, did you start taking your annual required minimum distribution from IRA (s) or Retirement account (s) as required?

Education Information

- Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?
 Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes attach any Form(s) 1098-T and receipts for qualified tuition and expenses.
 Did anyone in your family receive a scholarship of any kind during the year? If yes, were any of the Scholarship funds used for expenses other than tuition, such as room and board?
 Did you make any withdrawals from an education savings or 529 Plan account?
 If yes, were any of these withdrawals rolled over into a ABLE (Achieving a Better Life Experience) account?
 Did you make any contributions to an education savings or 529 Plan account?
 Did you pay any student loan interest this year?
 Did you cash any Series EE or I U.S. Savings bonds issued after 1989?
 Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education?

Health Care Information

- Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent. If yes, attach any Form(s) 1095-B and/or 1095-C you received.
 If you had qualifying health care coverage, such as employer-sponsored coverage or government coverage (i.e. Medicare/Medicaid) for your family, was everyone covered for every month of 2017? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent.

Yes **No**

- Did anyone in your family qualify for an exemption from the health care coverage mandate? Examples of exemptions include (but are not limited to) certain non-citizens, members of health care sharing ministry, members of Federally-recognized Indian tribes, and exemptions requested from the Marketplace. If yes, attach the Exemption Certificate Number (ECN) or type of exemption.
- Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, please provide any Form(s) 1095-A you received.
- Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care act and share a policy with anyone who is not included in your family?
- Did you make contributions to a Health savings account (HSA) or Archer MSA?
- Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?
- Did you pay long-term care premiums for yourself or your family?
- Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 5498-QA you received.
- Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 1099-QA you received.
- If you are a business owner, did you pay health insurance premiums for your employees this year?
- Did you receive any Health Coverage Tax Credit (HCTC) advance payments? If yes, attach any Form(s) 1099-H you received.

Itemized Deduction Information

- Did you incur a casualty or theft loss or any condemnation awards during the year?
- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
- Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? If yes, please provide evidence such as a receipt, statement, or letter of donation from donee organization, as a contemporaneous receipt is required by law prior to filing.
- Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgement from donee organization.
- Did you pay real estate taxes for your primary home and/or second home?
- Did you pay any mortgage interest on an existing home loan? If yes, attach any Form(s) 1098 you received.
- Did you incur expenses associated with any investment accounts you held?
- 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 have any expenses related to seeking a new job during the year?
- Did you make any major purchases during the year (cars, boats, etc.)?
- Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?

Miscellaneous Information

- Did you make gifts of more than \$15,000 to any individual?
- Did you utilize an area of your home for business purposes?
- Did you engage in any bartering transactions?
- Did you retire or change jobs this year?
- Did you incur moving costs because of a permanent change of station as a member of the Armed Forces or active duty?
- Did you pay any individual as a household employee during the year?
- Did you make energy efficient improvements to your main home this year?
- Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
- Did you have a financial interest in or signature authority over financial account such as a bank account, securities account, or brokerage account, located in a foreign country?
- Do you have any foreign financial accounts, foreign financial assets, or hold an interest in a foreign entity?
- Did you receive correspondence from the State or the Internal Revenue Service?
If yes, explain: _____
- Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?
- Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.