

2018 Tax Return Questionnaire

Client Name _____

- 1.) If there are changes to your list of dependents, please explain below.
Explanation: _____

- 2.) If you moved, please list your current address: _____

- 3.) Please list your email address _____
Spouse email address _____

- 4.) Did you make any energy efficient improvements to your home in 2018?
_____ Yes _____ No

If so, please identify the improvement and provide a **RECEIPT** for the work completed: _____

- 5.) Did you purchase a motor vehicle or boat in 2018? _____ Yes _____ No
*If so, please provide documentation showing sales tax paid.

- 6.) Did you buy, sell, or refinance real estate property in 2018? _____ Yes _____ No
*If so, please provide the **HUD STATEMENT** for each property

- 7.) Did you have health insurance for 2018? _____ Yes _____ No
*If so, how many months during 2018 were you covered? _____
Please provide **FORM 1095-A OR FORM 1095-B, if applicable.

- 8.) Did you incur dependent care expenses in 2018? If so, please provide a statement from the dependent care provider showing their EIN#, address, and amounts received.
_____ Yes _____ No

- 9.) If you use your vehicle for your business, please provide the following:

Make and Model of Vehicle _____

Total Miles for the Vehicle in 2018 _____ Business Miles in 2018 _____

- 10.) Please provide the amount of property taxes paid and the date paid.

- 11.) Did you make estimated tax payments? If so, list the dates paid and amount _____

- 12.) If funding a traditional IRA will reduce your tax liability in 2018, would you like for us to notify you?
_____ Yes _____ No

- 13.) If you are due a tax refund, would you like for it to be direct deposited into a bank account?
_____ Yes _____ No
*If so, please check one of the following:
_____ My direct deposit information is the same as in 2017

_____ I have attached a voided check for the bank account I want to use

Important Note: For non-cash donations, we need receipts that include date, organization and estimated value of donation.