

# 2019 Tax Questionnaire for \_\_\_\_\_

Client Name

## Contact Information

To ensure we have the most up-to-date information, please fill in your information below.

Phone: \_\_\_\_\_ Spouse's Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_ Spouse's Email: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_  
 \_\_\_\_\_

## General

Would you prefer a PDF copy of your tax return available on your client portal or would you prefer a paper copy?	PDF	Paper	Both
Would you like a half-hour exit meeting to discuss your return (a \$100 fee)?		Yes	No
If you receive a refund, would you like direct deposit?		Yes	No
If you would like direct deposit, is your bank account information the same as what we have on file? If not, please provide us with a voided check.		Yes	No
May the IRS discuss your tax return with your preparer?		Yes	No

## Personal and Dependent Information

Did your marital status change in 2019? If yes, please explain: _____	Yes	No
Did you have a baby or did any children leave the home in 2019? If yes, please enter their name, Social Security number, and date of birth: _____	Yes	No
Did you have any dependents with interest, dividend, or capital gains income in excess of \$1,100 or total investment income in excess of \$2,200?	Yes	No

## Health Insurance

Did you and your dependents have health care coverage for the full year?	Yes	No
If you were on a Marketplace plan, did you receive a subsidy for reduced payment? If yes, provide Form 1095-A.	Yes	No
Did you receive any of the following forms: 1095-A, 1095-B, 1095-C? If yes, please provide the form with your tax information.	Yes	No

## Retirement and Health Savings Account Plans

Did you transfer or rollover any amount from one retirement plan to another?	Yes	No
Did you receive a distribution from an HSA or a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc)?	Yes	No
Did you make a contribution to a retirement plan?	Yes	No
Did you make a contribution to a health savings account (HSA)?	Yes	No

## Education

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?	Yes	No
Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?	Yes	No

## Purchases, Sales and Debt

Did you buy or sell any stocks, bonds, or other investment property in 2019?	Yes	No
Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?	Yes	No
Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?	Yes	No
Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?	Yes	No
Did you have any debts cancelled or forgiven?	Yes	No
Does anyone owe you money which has become uncollectible?	Yes	No

### Income

Did you receive unreported tip income of \$20 or more in any month?	Yes	No
Did you have any foreign income or pay any foreign taxes?	Yes	No
Did you or your spouse receive any gifts from an individual that total more than \$15,000, or any gifts from a trust?	Yes	No
Did you receive any income that you did not receive a tax form for?	Yes	No

### Itemized Deductions

Did you incur a loss because of damaged or stolen property?	Yes	No
Did you work out of town for part of the year?	Yes	No
Did you use your car on the job (other than to and from work)?	Yes	No
Did you have any volunteer miles or make any non-cash charitable contributions?	Yes	No
Did you pay any 2020 real estate taxes in 2019?	Yes	No
If yes, had any of the paid 2020 taxes not been assessed in 2019?	Yes	No

### Miscellaneous

Was your home rented out or used for business?	Yes	No
Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?	Yes	No
Did you or your spouse make any gifts to an individual that total more than \$15,000, or any gifts to a trust?	Yes	No
Did you incur moving expenses due to a change of employment?	Yes	No
Did you engage the services of any household employees?	Yes	No
Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?	Yes	No
Did you receive any money or other benefits due to the death of a loved one?	Yes	No

## Estimated Taxes

Did you apply an overpayment of 2018 taxes to your 2019 estimated tax (instead of being refunded)? Yes      No

If you have an overpayment for 2019, do you want your refund applied to your 2020 estimated tax instead of having it sent to you? Yes      No

Do you expect your 2020 taxable income and withholdings to be significantly different from 2019? Yes      No

Did you make any estimated tax payments for 2019? If yes, enter your payments below (include date, amount, and whether it was federal, state, or local). Yes      No

<b>Federal</b>		<b>State</b>		<b>Local</b>	
Date	Amount	Date	Amount	Date	Amount
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

## Details

Please use the available space below to enter any additional information.