



Name: _____ Email: _____

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Please complete the following 2019 tax year questionnaire, sign and return it to our office.

Thank you!

PERSONAL INFORMATION

YES NO

- 1) Did your marital status change this year?
 2) Did your address change during this year? _____

New address (if applicable)

- 3) Can you be claimed as a dependent by another person?
 4) Did your bank account change during the year for direct deposit purposes? If yes, please provide routing number, account number, name of bank, and type of account.

 5) Have you been a victim of identity theft or identity fraud?
 6) Have you served or are you currently serving in the United States military?

DEPENDENTS

YES NO

- 7) Were there any changes in dependents? For a new dependent, please provide a social security card.
 8) Were any of your unmarried children, who might be claimed as dependents, 19 years of age or older at the end of 2019?
 9) Did you have any dependents during 2019 who earned investment income?
 10) Did you pay for childcare for your child, under age 13, so that you could work?

ESTIMATED TAXES

YES NO

- 11) Did you make any estimated tax payments for 2019? If so, please provide date(s) paid and amount(s). _____
 12) If you have an overpayment of 2019 taxes, do you want the excess applied to your 2020 estimated tax taxes?

INCOME

YES NO

- 13) Did you receive or pay alimony due to a divorce decree issued prior to 2019?
If so, what is the amount? \$_____
- 14) Did you cash any Series EE U.S. savings bonds?
- 15) Did you receive any disability income?
- 16) Did you have any foreign income or pay any foreign taxes?
- 17) Did you have an interest in or other authority over a financial account in a foreign country?

PURCHASES, SALES, AND DEBT

YES NO

- 18) Did you start a business, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- 19) Did you sell any stocks, bonds, or other investment property?
- 20) Did you purchase, sell, or refinance your principal home or second home, or take out a home equity loan? If so, provide **all** settlement statements.
- 21) Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?
- 22) Did you have any debts cancelled or forgiven?
- 23) Did you invest in any cryptocurrency, such as BitCoin?

RETIREMENT PLAN

YES NO

- 24) Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
- 25) Did you make or plan to make a contribution to a Roth or Traditional IRA.
- 26) Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- 27) Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?

EDUCATION

YES NO

- 28) Did you or your dependent receive a distribution from an Education Savings Account or a Qualified Tuition Program? If so, please provide Form 1099-Q.
- 29) Did you or your dependent incur any tuition or education expenses that were required to attend a college, university, or vocational school? If so, please provide Form 1098-T and an account summary from the educational institution.
- 30) Did you pay student loan interest?

BUSINESS OWNERS AND RENTAL PROPERTY

YES NO

- 31) Was your home or other property you own, rented out or used for business?
- 32) Did you make any payments in 2019 that would require you to file Form(s) 1099?
 - a) If "Yes", did you or will you file required Forms 1099?
- 33) Are you claiming car or truck expenses for business use?
 - a) Was your business vehicle available for personal use during off-duty hours?
 - b) Do you (or your spouse) have another vehicle available for personal use?
 - c) Do you have evidence to support your deduction?
- 34) Do you maintain separate books and records to reflect income and expenses?
- 35) Did you perform a total of 250 or more hours of rental services during 2019 for your rental property?

MISCELLANEOUS

YES NO

- 36) Do you have a reason to opt out of e-filing?
- 37) Do you and/or your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- 38) May the IRS discuss your tax return with your preparer in the event of an IRS notice?
- 39) Did you engage the services of any household employees such as a nanny or housekeeper?
- 40) Did you have a high deductible health plan and contribute funds to a Health Savings Account?
- 41) Did you pay long-term care expenses to an assisted living facility or home health provider?
- 42) Did you receive any correspondence from the Internal Revenue Service?
- 43) Did you or your spouse make any gifts to an individual or trust that total more than \$15,000?
- 44) Do you want access to your 2019 tax return copy electronically?

ITEMIZED DEDUCTIONS

For 2019, the standard deduction has been increased to \$24,400 for married couples, \$18,350 for head of household, and \$12,200 for single or married filing separately. If you are 65 and older, an additional deduction of \$1,300 per person if married and \$1,650 for a single person is allowed.

If you feel that itemizing deductions for your medical expenses, mortgage interest, property taxes, sales taxes, and contributions would exceed the standard deduction allowed, include corresponding documents. Please note, the total combined amount for real estate and sales taxes is capped at \$10,000 and medical expenses must exceed 7.5% of your adjusted gross income.

Please sign and date below:

Taxpayer

Date

Spouse

Date