



Name: _____

2018 Tax Questionnaire

Please check the appropriate box and include all necessary details and documentation.

General

Yes No

How would you like your tax return delivered to you? (choose at least one)

Portal Paper (pick up) Flash drive (pick up)

Would you like to discuss extending your return?

Would you like to sign your return using e-signature? If so, please confirm your email addresses: Taxpayer: _____ Spouse: _____

Is your 2018 tax situation substantially different than it was in 2017?

If so, please explain: _____

Personal

Did your marital status change during the year?

If yes, explain: _____

Did your address change from last year?

Can you be claimed as a dependent by another taxpayer?

Have you or one of your dependents been a victim of identity theft?

If yes, did you receive an Identity Protection PIN (IP PIN) from the IRS?

Did you retire or change jobs during the year?

Do you expect a large fluctuation in income, deductions, or withholding in 2019?

Bank Electronic Funds

If you have a n overpayment (i.e. tax paid exceeds tax liability), would you like the overpayment applied to next years's tax liability rather than refunded?

If you would like your overpayment refunded, would you like the refund deposited directly to your bank account?

If you owe tax, would you like the payment to be withdrawn directly from your bank account?

All payments will have the default date of 4/12/19. If you prefer a different date for your withdrawal list it here _____

Did your bank account for direct deposit or electronic payment change from last year? If so, please securely provide a copy of a voided check.

Dependent

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 investment income in excess of \$2,100?

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?

Did you pay any expenses related to the adoption of a child during the year?

If you are divorced or separated with children, are you the custodial parent?

If no, did the custodial parent sign a Form 8332, dependency exemption release?

Purchases, Sales and Debt

Yes No

Did you purchase, sell or refinance a principal residence or second home during the year? (Please provide the settlement statements.)

* Purchase

* Sell

* Refinance

Did you pay interest on a home equity loan this year? If so, were the funds used to:

* buy, build or substantially improve your home?

* invest in a business?

* purchase a rental property?

* None of these

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

Did you purchase, sell or refinance a rental property during the year? (Please provide the settlement statements.)

* Purchase

* Sell

* Refinance

Did you purchase or sell a business, partnership or S corporation during the year?

Did you acquire or dispose of any stock during the year?

Did you lend money with the understanding of repayment and this year it became totally uncollectible?

Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan? (Please provide Form 1099-C)

Income

Did you receive any income from property sold prior to this year (installment sale)?

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?

Foreign Income

The following questions are required for all filers:

Did you have any foreign income or pay any foreign taxes during the year (such as income on foreign investment accounts, foreign bank accounts, or a foreign employer?)

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 a 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 interest in a foreign entity or foreign contract?

Retirement**Yes No**

Are you a participant in a pension or retirement plan?

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

Are you interested in contributing more to your traditional or Roth IRA for 2018, if allowed?

Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

Did you receive any Social Security benefits during the year?

Did you receive any lump-sum payments from a pension or profit sharing plan?

Did you begin taking Required Minimum Distributions (RMDs) from an IRA or qualified plan?

Education

Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? (Please provide Form 1098-T)

Did anyone in your family receive a scholarship of any kind during the year?

Did you make any withdrawals from an education savings or 529 Plan account? (Please provide Form 1098-Q)

Did you make any contributions to an education savings or 529 Plan account? If yes, was it to a Colorado plan (CollegeInvest)?

Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

Did you pay interest on a student loan? (Please provide Form 1098-E)

Health Care**The next two questions are required for all filers:**

Did you have qualifying health care coverage, for you, your spouse (if filing jointly), and anyone you can claim as a dependent?

If yes, did any of you lack coverage for any month of the year?

Please explain: _____

Did you enroll for coverage through Connect For Health Colorado?

If so, did you share a policy with anyone who is not included in your family?

Health Care (Continued)

Did you make any contributions to a Health savings account (HSA) or Archer MSA?

If yes, is it a _____ self-only plan _____ family plan

Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?

If yes, were any of the distributions used to pay nonqualified medical expenses?

Did you pay long-term care premiums for yourself or your family?

Did you make any contributions to or withdrawals from an ABLÉ (Achieving a Better Life Experience) account?

Itemized Deductions**Yes****No**

Did you incur a business-related casualty or theft loss or any condemnation awards during the year?

Did you pay out-of-pocket medical expenses (co-pays, prescription drugs, etc.) likely to total more than 7.5% of your Adjusted Gross Income?

Please provide an estimate of your medical expenses: _____

We will contact you if we feel we need a detailed schedule of medical expenses.

Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)?

If yes, do you have evidence such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made?

Did you donate a vehicle or boat during the year?

Did you work out of state for part of the year?

Did you make any major purchases during the year (cars, boats, etc.), excluding real estate?

This question is required for all Colorado filers:

Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax?

If yes, enter the amount: _____

Miscellaneous

Did you make gifts of more than \$15,000 to any individual?

Did any of your personal or business activities involve a federally declared disaster zone?

If you own a business and file Schedule C, did you use an area of your home regularly and exclusively for business purposes?

If so, would you like to pursue a home office deduction?

Did you engage in any bartering transactions?

Did you pay any individual \$2,100 or more as a household employee during the year?

Did you add solar panels to your home?

Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?

Did you receive a tax notice from the State or the IRS?

If yes, please explain: _____

Do you have unfiled tax returns from previous years?

Are you on a payment plan with a taxing authority or do you have an unpaid balance due on a prior year tax return?

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.

Do you have a current estate plan in place (wills, revocable living trust, advance directives, etc.)?

Have you recently reviewed your beneficiary designations on any life insurance policies or retirement plans?