

Miscellaneous Questions

PLEASE CAREFULLY ANSWER THESE QUESTIONS AND BE SURE TO PROVIDE ALL REQUESTED DOCUMENTATION FOR TAX FILING ACCURACY.

Provide proof of identity for you, your spouse and dependents, if applicable. (Current drivers license and social security card)

Yes No

Personal Information:

- Are you a citizen of the United States of America?
Is your spouse (if applicable) a citizen of the United States of America?
Did your address, phone or email change during the year? If yes, provide:
Did your marital status change during the year? If yes, explain:
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 for 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? If so, provide a copy of your new check.
Did you or 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.
Do you want to designate \$3 to the Presidential Election Campaign Fund?
Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
May the IRS discuss your tax return with your preparer?
Did you reside 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:
Were any of your unmarried children, who might be claimed as dependents, 19 years of age or older at the end of 2017? If yes, whom?
Did you have any children under age 19 or full-time students under age 24 at the end of 2017, with interest and dividend income in excess of \$1,000, or total investment income in excess of \$2,100? If yes, please provide their information.
Do you have dependents who must file a tax return? If yes, whom
Did you provide over half the support for any other person(s) other than your dependent children during the year? If yes, whom
Did you pay for child care while you worked, looked for work, or while a full-time student? If yes, attach child care provider information.
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? If yes, attach agreement.

Miscellaneous Questions

Yes No

Retirement Information:

- Did you retire or change jobs this year? If yes, what date? _____ Yes No
- Are you an active participant in a pension or retirement plan? Yes No
- Did you receive any Social Security benefits during the year? If yes, attach documents. Yes No
- Did you make any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? If yes, attach documents. Yes No
- Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan? If yes, attach documents. Yes No
- Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? If yes, attach documents. Yes No
- Did you plan on contributing to an IRA for the 2017 tax year before April 15, 2018? If yes, how much? _____. If you would like us to calculate the maximum amount and contact you to discuss, please check here _____. Yes No

Income Information:

- Did you receive any income from property, sold prior to this year? If yes, provide information. Yes No
- Did you receive any unemployment benefits during the year? If yes, attach document. Yes No
- Did you receive any disability income during the year? If yes, attach document. Yes No
- Did you receive tip income not reported to your employer this year? If yes, how much? _____ Yes No
- Did any of your life insurance policies or annuities mature, or did you surrender any policies or annuities? If yes, attach 1099-R, 1099-INT or 1099 DIV. Yes No
- Did you receive any awards, prizes, hobby income, gambling or lottery winnings? If yes, attach form 1099-MISC or 1099-G. Yes No
- Did you receive any alimony or maintenance? If yes, please provide amount. \$ _____ Yes No

Purchases, Sales and Debt Information:

- Did you start a new business or sell an existing business during the year? If yes, provide documents. Yes No
- Did you sell, exchange, or purchase any assets used in your trade or business? If yes, provide documents. Yes No
- Did you acquire a new or additional interest in a partnership or S corporation? Yes No
- Was your home rented out or used for business? If yes and you plan on taking the in home office deduction, please provide information. Yes No
- Did you engage in any bartering transactions? If yes, attach information. Yes No
- Did you sell, exchange, or purchase any real estate, rental property or personal residence during the year? If so, provide the closing or HUD settlement statement. Yes No
- Did you foreclose or abandon a principal residence or real property during the year? If yes, provide documents. Yes No
- Did you acquire or dispose of any stock during the year? If yes to a disposition, attach form 1099-B. Yes No
- Did you open a home equity loan this year? If yes, provide documents. Yes No

Miscellaneous Questions

Yes No

Purchases, Sales and Debt Information (Cont'd):

Did you refinance a principal residence or second home this year? If yes, attach HUD settlement statement.

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

Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)? If yes, attach form 1099-C.

Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year? If yes, attach invoice.

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? If yes, whom _____

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 related expenses.

Did anyone in your family receive a scholarship of any kind during the year? If yes whom? _____ Amount? _____

If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board? If yes, amount? _____

Did you make any withdrawals from an education savings or 529 Plan account? If yes, attach form 1099-Q.

Did you make any contributions during 2017 to an education savings or 529 Plan account? If yes, attach documentation.

Did you pay any student loan interest this year? If yes, attach 1098-E.

Did you cash any Series EE or I U.S. Savings bonds issued after 1989? If yes, amount used for education expenses _____

Health Care Information:

Did you, your family and dependents, have qualifying health care coverage? If yes, attach any Form(s) 1095-B and/or 1095-C you received.

Did anyone in your family qualify for an exemption from the health care coverage mandate? 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, attach 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 any contributions to a Health savings account (HSA) or Archer MSA? If yes, how much? _____ Provide documents.

Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year? If yes, attach form 1099-SA.

Was the total distribution used for medical expenses?

Miscellaneous Questions

Yes No

Health Care Information (Cont'd):

Did you make any contributions to an ABLÉ (Achieving a Better Life Experience) account? If yes, attach any Form(s) 5498-QA you received.

Did you receive any withdrawals from an ABLÉ (Achieving a Better Life Experience) account? If yes, attach any Form(s) 1099-QA you received.

Itemized Deduction Information:

Did you incur a casualty or theft loss or any condemnation awards during the year? If yes, attach documentation.

Did you pay out-of-pocket medical expenses? If yes, provide amounts:

Doctors & Hospitals _____ Prescription Drugs _____ Insurance Premiums _____
 Medical Miles Driven _____ Long-term Care Premiums _____

Did you make any cash charitable contributions? If so, how much? _____ Provide documents for contributions \$250 or greater.

Did you make any noncash charitable contributions? If yes, please provide evidence such as receipt from the donee organization to substantiate all contributions made.

Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgement from the donee organization.

Did you pay real estate taxes for your primary home and/or second home? If yes, attach real estate tax receipts.

Did you pay any mortgage interest on an existing home loan? If yes, attach any Form(s) 1098 you received.

Did you incur interest expenses associated with any investment accounts you held? If yes, provide documents.

Did you have unreimbursed employee expenses or an allowance? If yes, please provide a summary of the type and amounts of expenses you paid during the year.

Did you use your car on the job, for other than commuting? If yes, provide:

Total miles driven in 2017 _____
 Total business miles driven in 2017 _____

Did you work out of town for part of the year? If yes, provide dates: _____

Did you have any expenses related to seeking a new job during the year? If yes, provide summary of amount & type of expenses incurred.

Did you incur moving costs because of a job change? If yes, attach documentation.

Did you make any major purchases during the year (cars, boats, etc.)? If so, attach documents.

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

If so, please provide the amount \$ _____.

Are you a teacher or school administrator who provided school supplies in your job and were not reimbursed? If yes, provide amount paid during 2017 \$ _____.

Miscellaneous Questions

Yes No

Estimated Taxes:

Did you make quarterly estimated payments for 2017? If yes, please provide copies of canceled checks for proof of payment.

If you have an overpayment of 2017 taxes, do you want excess applied to your 2017 estimated tax (instead of being refunded)?

Do you expect your 2018 taxable income and withholdings to be different from 2017? If yes, please tell us how and why.

Foreign Income & Accounts:

Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?

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? If yes, please provide the institutions name, account number and highest balance during 2017.

Do you have any foreign financial assets, or hold interest in a foreign entity?

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer? If yes, provide information.

Miscellaneous Information:

Did you make gifts of more than \$14,000 to any individual during 2017? If yes, provide information.

Did you engage the services of any household employees and pay them greater than \$2000 during 2017? If yes, please provide information.

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? If yes, provide receipts.

Did you receive correspondence from the State or the IRS? If yes, explain:

Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due? If yes, years? _____ Amounts? _____

In case we have questions, will you be out of town at any point in time before and including April 15? If yes, please provide the dates you will be out of town. _____

Thank you!

Taxpayer Signature

Date

Spouse Signature (if applicable)

Date