

Tax Preparation Questionnaire

Name(s)_____

Phone(s)_____

Email(s)_____

Preferred Contact Method? Circle One- Phone Email Text (number_____)

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

	Yes	No
Personal Information		
Did your marital status change during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did your address change from last year?	<input type="checkbox"/>	<input type="checkbox"/>
Can you be claimed as a dependent by another taxpayer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you change any bank accounts used for tax refund direct deposits?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive an Identity Protection PIN from the IRS?	<input type="checkbox"/>	<input type="checkbox"/>
Dependent Information		
Were there any changes in dependents from the prior year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you provide over half the support for anyone other than your dependent child?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay for child care while you worked or while a full-time student?	<input type="checkbox"/>	<input type="checkbox"/>
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?	<input type="checkbox"/>	<input type="checkbox"/>
Purchases, Sales and Debt Information		
Did you start a new business or acquire a business interest or rental property?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange, or purchase any assets used in your trade or business?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange, or purchase any real estate during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase or sell a principal residence during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire or dispose of any stock during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you take out a home equity loan this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you refinance a principal residence or second home this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell an existing business, rental, or other property this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any debts canceled or forgiven this year?	<input type="checkbox"/>	<input type="checkbox"/>
Income Information		
Did you receive any unemployment benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any disability income during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive tip income not reported to your employer this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did any of your life insurance policies mature, or did you surrender any policies?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	<input type="checkbox"/>	<input type="checkbox"/>
Retirement Information		
Are you an active participant in a pension or retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any Social Security benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from an IRA, Roth, 401(k), or other retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to an IRA, Roth, 401(k), or other retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
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? Include Form 1098-T?	<input type="checkbox"/>	<input type="checkbox"/>
Did anyone in your family receive a scholarship? All used for tuition?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from an education savings or 529 Plan account?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to an education savings or 529 Plan account?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, was it a Wisconsin Edvest or Tomorrow's Scholar Account?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any student loan interest this year? Include Form 1098-E?	<input type="checkbox"/>	<input type="checkbox"/>
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
Health Care Information		
Did you have health insurance? If yes, include any Form(s) 1095-B and/or 1095-C.	<input type="checkbox"/>	<input type="checkbox"/>
Did anyone in your family qualify for an exemption from the health care coverage mandate? If yes, attach the Exemption Certificate Number or type of exemption	<input type="checkbox"/>	<input type="checkbox"/>
Did you enroll for Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, attach any Form(s) 1095-A you received.	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to a Health Savings Account (HSA)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any distributions from, or pay medical bills using, an HSA?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay long-term care premiums for yourself or your family?	<input type="checkbox"/>	<input type="checkbox"/>
Itemized Deduction Information		
Did you incur a casualty or theft loss or any condemnation awards during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made.	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay real estate taxes for your primary home and/or second home?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any mortgage interest on an existing home loan? Include Form 1098.	<input type="checkbox"/>	<input type="checkbox"/>
Did you use your car on the job, for other than commuting, and not get reimbursed?	<input type="checkbox"/>	<input type="checkbox"/>
Did you work out of town for part of the year, and not get reimbursed?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any major purchases during the year (cars, boats, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
Miscellaneous Information		
Did you make gifts of more than \$14,000 to any individual?	<input type="checkbox"/>	<input type="checkbox"/>
Did you utilize an area of your home exclusively for business purposes?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make energy efficient improvements to your main home this year?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive correspondence from the State or the IRS?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have previous years of tax returns that are either unfiled or unpaid?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to designate \$3 to the Presidential Election Campaign Fund?	<input type="checkbox"/>	<input type="checkbox"/>
Wisconsin Related Items:		
Did you make out-of-state purchases that you did not pay sales tax on?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any tuition to a private school (K-12) in 2016? Please provide details.	<input type="checkbox"/>	<input type="checkbox"/>
Property taxes paid in 2017 on your main residence(w/o garbage or spec. assess.)	\$	_____
Amount of rent paid in 2017 . Does rent include heat? Yes___ No___	\$	_____
Health insurance you paid in 2017 (not pre-tax).	\$	_____

If you think you qualify for **Homestead Credit** or **Farmland Preservation Credit**, please bring a **completed Rent Certificate** or **2017 Real Estate Tax Bill**.

ANY QUESTION NOT ANSWERED WILL BE ASSUMED TO BE "NO".

The information I provided is complete & accurate to the best of my knowledge, and I provided or have the necessary documentation of the income and deductions listed.

Signature

Date:

If you did not have your tax return prepared by our office last year, please provide dates of birth for you, spouse, and dependents (if applicable) in the space below. Thank you.