

## Tax Preparation Questionnaire

Name(s) \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

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

	Yes	No
<b>Personal Information</b>		
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(for Direct Deposit of Refunds)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive an Identity Protection PIN (IP PIN) from the IRS ?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Dependent Information</b>		
Were there any changes in dependents from the prior year?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have dependents who must file a tax return?	<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"/>
<b>Purchases, Sales and Debt Information</b>		
Did you start/sell a business or purchase/sell rental property during the year?	<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 have any debts canceled or forgiven this year?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Income Information</b>		
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 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"/>
<b>Retirement Information</b>		
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/contributions to an IRA, Roth,401(k) etc?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Education Information</b>		
Did you, your spouse, or your dependents attend college? <b>1098-T required</b>	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals/contributions for an education savings or 529 Plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any student loan interest this year?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Health Care Information</b>		
Did you enroll in Marketplace Coverage with healthcare.gov under? <b>1095-A required</b>	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions/distributions to a Health savings account (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"/>

*continued on next page*

**Itemized Deduction Information**

- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
- Did you make any cash/noncash donations (clothes, furniture)? **Receipts required**
- Did you pay real estate taxes for your home and/or other property?
- Did you pay any mortgage interest on an existing home loan? Include 1098

**Miscellaneous Information**

- Did you make gifts of more than \$15,000 to any individual?
- Did you utilize an area of your home for business purposes?
- Do you have any foreign accounts, financial assets/hold interest in a foreign entity?
- Did you receive correspondence from the State or the IRS? Explain

**Wisconsin Related Items**

- Did you make any out of state purchases that you did NOT pay sales tax on?
- Did you pay any private school tuition (K-12) in 2019? Provide details.
- Property taxes on main residence paid in 2019(w/o garbage or spec assess). \$ \_\_\_\_\_
- Amount of rent paid in 2019. Heat included? Yes \_\_\_\_\_ No \_\_\_\_\_ \$ \_\_\_\_\_
- Health insurance paid in 2019 (not pre-tax) \$ \_\_\_\_\_

ANY QUESTIONS NOT ANSWERED WILL BE ASSUMED TO BE "NO"

**Acknowledgement of Engagement:**

**The information I provided is complete and accurate to the best of my knowledge. I have provided or have retained the necessary documentation of the income and deductions listed. I understand that I am responsible for the accuracy of the information used in preparation of my tax return, and for reviewing my tax return before it is filed.**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

*If our office did not prepare your tax return last year please provide all dates of birth and last years tax return. Thank you.*