

## 2019 Tax Questionnaire

**Name:** \_\_\_\_\_ **Sign & Date:** \_\_\_\_\_

**Personal and Dependent Information:**

**Yes    No**

Did your marital status change? \_\_\_\_\_ \_\_\_\_\_

Were there any changes in dependents from the prior year? \_\_\_\_\_ \_\_\_\_\_

Did you or your spouse pay for child care while you or your spouse worked or looked for work? \_\_\_\_\_ \_\_\_\_\_

Do you have any children under age 18 with unearned income more than \$1,050? \_\_\_\_\_ \_\_\_\_\_

**Healthcare:**

If you or your spouse are self-employed, provide health insurance premiums paid for your entire family: \_\_\_\_\_

Did you or your spouse have any transactions pertaining to a health savings account (HSA)? \_\_\_\_\_ \_\_\_\_\_  
If yes, include all Forms 1099-SA and 5498-SA.

**Deductions and Credits:**

Did you or your spouse make any large purchases, such as vehicles, boats, or home remodels? \_\_\_\_\_ \_\_\_\_\_

Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle? \_\_\_\_\_ \_\_\_\_\_

Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition? \_\_\_\_\_ \_\_\_\_\_  
If yes, include all Forms 1099-Q and 1098-T.

Did you or your spouse take out a home equity loan? \_\_\_\_\_ \_\_\_\_\_  
If yes, what did you use the funds for? \_\_\_\_\_

**Investments:**

Did you or your spouse own any foreign bank accounts or financial assets? \_\_\_\_\_ \_\_\_\_\_

Did you or your spouse refinance your home or have any debts canceled/forgiven? \_\_\_\_\_ \_\_\_\_\_

Did you or your spouse sell, exchange, or purchase any real estate? \_\_\_\_\_ \_\_\_\_\_

Did you or your spouse sell any securities not reported on Form 1099-B? \_\_\_\_\_ \_\_\_\_\_

Did you or your spouse turn age 70 ½ and have money in an IRA or other retirement account without taking any distribution? \_\_\_\_\_ \_\_\_\_\_

**Miscellaneous:**

Did you or your spouse pay in excess of \$1,000 in any quarter or \$2,100 during the year for domestic services performed in or around your home to individuals who could be considered household employees? \_\_\_\_\_ \_\_\_\_\_

Did you receive, sell, send, or exchange any financial interest in any virtual currency such as Bitcoin? \_\_\_\_\_ \_\_\_\_\_

Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value in excess of \$15,000 to any individual? \_\_\_\_\_ \_\_\_\_\_

Do you require a state income tax return for a state you are not currently residing in? \_\_\_\_\_ \_\_\_\_\_

Did you make any federal or state estimated tax payments? If yes, list payment amounts and dates below: \_\_\_\_\_ \_\_\_\_\_

	Federal – Amount Paid	Federal – Date Paid	State – Amount Paid	State – Date Paid
Q1 (4/15/19)	_____	_____	_____	_____
Q2 (6/15/19)	_____	_____	_____	_____
Q3 (9/15/19)	_____	_____	_____	_____
Q4 (1/15/20)	_____	_____	_____	_____