

Tax Organizer Questionnaire

Personal/Dependent Information

1. What is your marital status at the end of the year?

Mark only one oval.

- Married
- Married filing separately
- Single
- Widow(er)

2. Did any of your personal information, such as your address, phone numbers, or email change during the year?

Mark only one oval.

- Yes - Please provide the changes that occurred.
- No

3. Did you or your spouse renew your drivers license in 2019?

Mark only one oval.

- Yes - Please provide a copy of your new license
- No

4. Did you have any changes in dependents during the year?

Mark only one oval.

Yes - Please add the following dependent (please provide name, birth date, SSN and reason added, i.e. new birth, adoption, etc.)

Yes - Please remove the following dependent

No Changes

5. Did you pay for any childcare expenses during the year?

Mark only one oval.

Yes - Please provide the amount paid, the provider's name and address, the provider's EIN or SSN.

No

6. Did you have any children under age 19 or a full-time student under age 24 with more than \$2,200 of unearned income (i.e., interest, dividends, etc.)?

Mark only one oval.

Yes - Please provide proof of that income (i.e., 1099-INT, 1099-DIV, 1099-MISC, etc.)

No

7. If you have a child under the age of 17, if you paid for any childcare expenses for a child under the age of 13, or paid for college tuition for a child, you must provide the following documentation. Please contact me for additional guidance on the records needed.

Check all that apply.

- School records
- Medical records
- Daycare records

Health Care Information

8. Did all or some members of your household have healthcare coverage during the year?

Mark only one oval.

- Yes - All members had coverage for the entire year - Please provide copy(s) of Form 1095-A or B
- Yes - All or some members had coverage for part of the year - Please provide copy(s) of Form 1095-A or B
- No - No members had coverage for the entire year.

Income, Sales and Purchases Information

9. Please provide copy(s) of the following forms, if applicable.

Check all that apply.

- Form W-2 (Wages)
- Form 1099-R (IRA distributions, pensions, and annuities)
- Form 1099-SSA (Social Security Benefits)
- Form 1099-Div (Dividends)
- Form 1099-INT (Interest income)
- Form 1099-B (Brokerage transactions)
- Form 1099-MISC (Miscellaneous income)
- Form W2-G (Gambling winnings)
- Form 1099-G (State tax refunds, unemployment compensation)
- Schedule K-1 (Partnership, S Corporations, Estates, and Trusts - Please note that if I prepare any of these entity returns, I already have copies of the K-1)
- HUD Statement or Closing Statement (Real estate sales and purchases)
- Form 1099-C (Cancellation of debt)

10. Did you receive any tips not reported on your Form W-2?

Mark only one oval.

- Yes - Please provide the amount of tips received.
- No

11. **Did you receive any U.S. savings bonds during the year?**

Mark only one oval.

Yes

No

12. **Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currencies?**

Mark only one oval.

Yes

No

13. **Did you start a new unincorporated business or purchase any rental property during the year?**

Mark only one oval.

Yes - Please provide the income and expenses of the business.

No

14. **Did you purchase a rental property during the year?**

Mark only one oval.

Yes - Please provide the income and expenses of the rental property and the HUD statement or closing statement from the purchase of the property..

No

15. **Did you refinance your principal or second home or take out a home equity loan during the year?**

Mark only one oval.

Yes - Please provide the closing statement for the refinance and/or home equity loan.

No

16. **Did you (or your spouse) receive any alimony during the year?**

Mark only one oval.

Yes - Please provide the amount received. If you have not provided me with a copy of the divorce agreement and name and social security number of the payor in the past, please do so now.

No

17. **Did you repay any unemployment compensation to the state during 2019?**

Mark only one oval.

Yes - Please provide the amount repaid and any documentation that you have supporting that amount.

No

18. **Did you receive any scholarships or grants not reported on a Form W-2?**

Mark only one oval.

Yes - Please provide the amount and any documentation that you have supporting the scholarship or grant amount received.

No

19. Does anyone owe you money that has become uncollectible during the year?

Mark only one oval.

Yes - Please provide detail of the loan (amount, date loaned, to whom, steps taken to collect, how it was determined to be uncollectible)

No

20. Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?

Mark only one oval.

Yes - Please provide the purchase invoice, year, make, model, VIN and date the vehicle was placed in service.

No

Adjustments to Income

21. If you are not an educator, please skip this question. If you are an educator, did you paid for any classroom supplies during the year.

Mark only one oval.

Yes - Please provide the amount you paid, but no more than \$250 (or \$500 if both spouses are educators).

No

22. Did you (or will you) make contributions to a Health Savings Account (HSA)? Please note that you have until April 15, 2020 to make a contribution for the 2019 tax year.

Mark only one oval.

Yes - If your HSA contributions on not on your W-2, please provide the amount you and/or your spouse contributed (or will contribute).

No

23. Did you (or will you) make contributions to an Individual Retirement Account (IRA)? Please note that you have until April 15, 2020 to make a contribution for the 2019 tax year.

Mark only one oval.

Yes - Please provide the amount you and/or your spouse contributed (or will contribute). Please indicate if the contributions were made to a traditional or to a Roth IRA.

No

24. Did you (or your spouse) pay alimony to any person?

Mark only one oval.

Yes - Please provide the amount paid. If you have not provided me with a copy of the divorce agreement and name and social security number of the payor in the past, please do so now.

No

Itemized Deductions

25. **Did you pay out-of-pocket medical, dental, or vision expenses (health insurance premiums, long term care premiums, prescriptions, co-pays, medical mileage, medical travel expenses, etc.)?**

Mark only one oval.

Yes - Please provide a list or complete the Medical and Dental Expenses section on the Schedule A - Itemized Deductions page.

No

26. **Did you make any major purchases (vehicle, boat, plane, etc.) during the year?**

Mark only one oval.

Yes - Please provide a copy of the invoice(s) showing the amount paid and the sales tax amount.

No

27. **Did you pay any real estate or personal property taxes during the year?**

Mark only one oval.

Yes - Please provide a copy(s) of the tax bill showing the amount paid and the date paid.

No

28. **Did you pay any mortgage interest during the year?**

Mark only one oval.

Yes - Please provide copy(s) of Form 1098.

No

29. **Did you make any cash donations to charity(s) during the year?**

Mark only one oval.

Contributions

Yes - Please provide a list or complete the ~~Medical and Dental Expenses~~ section on the Schedule A - Itemized Deductions page.

No

30. **Did you make any cash donations of \$250 or more to charity(s) during the year?**

Mark only one oval.

Yes - Please provide a copy of the required letter received from the charity documenting the donation.

No

31. **Did you make any non-cash (clothes, furniture, household items, etc.) donations to charity(s) during the year?**

Mark only one oval.

Yes - Please provide a copy of the receipt received from the charity documenting the donation. Make sure to write down the fair market value of the items donated on the receipt. I am unable to determine the value of items donated.

No

32. Did you donate a boat or vehicle to charity(s) during the year?

Mark only one oval.

- Yes - Please attach Form 1098-C.
 No

33. Did you have any gambling losses during the year? Please note that you can only deduct gambling losses to the extent of gambling winnings.

Mark only one oval.

- Yes - Please provide the amount lost and any documentation that you have received supporting the gambling losses.
 No

Education Information

34. Did anyone in your household attend a post-secondary school during the year?

Mark only one oval.

- Yes - Please provide the name(s) of those who did attend a post-secondary school.
 No

35. Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year?

Mark only one oval.

- Yes - Please provide a copy of Form 1099-T (Tuition Statement).
 No

36. Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?

Mark only one oval.

- Yes - Please provide a copy of Form 1098-E (Student Loan Interest Statement) or letter received from the student loan processor documenting the amount of interest paid.
 No

Miscellaneous Information

37. Did you pay wages to any household employees (babysitter, nanny, housekeeper, handyman, driver, etc.) of \$2,000 or more for the year or \$1,000 or more in any one quarter during the year?

Mark only one oval.

- Yes
 No

38. Did you make gifts to any one person in excess of \$15,000 (cash or property) during the year?

Mark only one oval.

- Yes - Please provide a list of the amount gifted to each person.
 No

39. **Did you make any energy-efficient improvements (doors, windows, A/C systems, solar, etc.) to your main home during the year?**

Mark only one oval.

Yes - Please provide a copy(s) of the invoice(s) showing a description of the improvements and the amount(s) paid.

No

40. **Did you make any estimated payments toward your 2019 taxes?**

Mark only one oval.

Yes - Please provide a list of estimated payment amounts paid and dates paid.

No

41. **If you are receiving a refund on your tax return, do you want it directly deposited into your bank account?**

Mark only one oval.

Yes - Please provide a voided check or savings deposit slip. If you have provided this account information in the past, just verify that it has not changed.

No

42. **If you have a balance due on your tax return, do you want it directly withdrawn from your bank account?**

Mark only one oval.

Yes - Please provide a voided check or savings deposit slip. If you have provided this account information in the past, just verify that it has not changed.

No

43. **Do you want to grant permission for me to discuss your tax return with the IRS (and the state, if applicable), should the need arise after the return(s) is/are filed?**

Mark only one oval.

Yes

No

44. **I will provide you with a paper copy of your tax return(s) upon completion. Do you also want an electronic copy (pdf) sent to you using my secure client portal website?**

Mark only one oval.

Yes

No

Foreign Account Information

45. **Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?**

Mark only one oval.

Yes

No

46. If you answered no to the previous questions, you can skip this one. If you answered yes to the previous question, did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?

Mark only one oval.

- Yes
 No

47. Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?

Mark only one oval.

- Yes
 No

48. Did you have any income from, or pay taxes to, a foreign country?

Mark only one oval.

- Yes
 No

49. Did you or do you own property in a foreign country?

Mark only one oval.

- Yes
 No

"Sharing Economy" Questions

50. Did you receive income or incur expenses associated with a fantasy sport league? If yes, please provide documentation.

Mark only one oval.

- Yes
 No

51. Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)? If yes, please provide Form 1099-MISC and Form 1099-K.

Mark only one oval.

- Yes
 No

52. Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)? If yes, please provide Form 1099-K or Form W-2.

Mark only one oval.

- Yes
 No

53. **Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)? If yes, please provide documentation.**

Mark only one oval.

Yes

No

54. **Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)? If yes, please provide Form 1099-K.**

Mark only one oval.

Yes

No

55. **Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb or HomeAway)? If yes, please provide documentation.**

Mark only one oval.

Yes

No

56. **Do you anticipate your income or withholdings to be different for 2020?**

Mark only one oval.

Yes - Please provide a description of the anticipated change(s).

No