

## Client Tax Questionnaire

### 1. Personal Information

	Name	Email	Phone	Date of Birth
Taxpayer				
Spouse				
	Street Address	City	State	ZIP

**Filing Status**

Married	Will file jointly	Yes	Single	Other
		No		

### 2. Direct Deposit / Electronic Withdrawal

Would you like to have your refund(s) directly deposited into your account?	Yes	No
Would you like to have your balance due(s) electronically withdrawn from your account?	Yes	No

### ACCOUNT

Name of financial institution \_\_\_\_\_

Financial Institution Routing Transit Number \_\_\_\_\_

Your account number \_\_\_\_\_

### 3. Please answer the following questions

Any questions answered Yes will likely require you to provide additional detailed information.

1. Would you like to receive a paper copy of the return in addition to the electronic (PDF) copy?	Yes	No	5. Did you receive rent from real estate or other property? If so, please complete Sch E organizer pages.	Yes	No
2. Did you receive any correspondence from the IRS or State Department of Taxation? If so, please provide a copy.	Yes	No	6. Were there any births, deaths, marriages, divorces or adoptions in your immediate family?	Yes	No
3. Have you or your spouse been a victim of identity theft and been given an identity theft protection PIN by the IRS? If yes, enter the six digit identity protection PIN number.	Yes	No	7. Were there any changes in dependents from the prior year?	Yes	No
_____ Taxpayer _____ Spouse			8. Did you have any children under the age of 23 years old with unearned income of more than \$1,100?	Yes	No
4. Are you self-employed? If so, please complete Sch C organizer pages.	Yes	No	9. Did you give a gift of more than \$15,000 to one or more people?	Yes	No

<p>10. If you paid rent, how much did you pay? What is your landlord's name?</p> <p>_____</p> <p>_____</p>		<p>18. Do you have a foreign bank account, trust, or business? If so, please provide details.</p>	<p>Yes      No</p>
<p>11. Did you pay interest on a student loan for yourself, your spouse, or your dependent during the year? If so, please provide details.</p>	<p>Yes      No</p>	<p>19. Did you own \$50,000 or more in foreign financial assets?</p>	<p>Yes      No</p>
<p>12. Did you pay expenses for yourself, your spouse, or your dependent to attend classes beyond high school?</p>	<p>Yes      No</p>	<p>20. Did you or your spouse sell, acquire, or exchange Bitcoin or other virtual currencies or engage in any sales or exchanges denominated in Bitcoin or other virtual currencies?</p>	<p>Yes      No</p>
<p>13. Did you have any debts canceled, forgiven, or refinanced? If so, please provide details.</p>	<p>Yes      No</p>	<p>21. Did you or your spouse pay in excess of \$1,000 in any quarter, or \$2,200 during the year for domestic services performed in or around your home to individuals who could be considered household employees?</p>	<p>Yes      No</p>
<p>14. Did you have healthcare coverage (health insurance) for you, your spouse and dependents? If yes, include Forms 1095-A, 1095-B, 1095-C or 1099-HC.</p>	<p>Yes      No</p>	<p>22. Did you or your spouse sell, exchange or purchase any real estate? If so, please include closing statements.</p>	<p>Yes      No</p>
<p>15. Did you or your spouse have any transaction pertaining to a HSA/MSA?</p>	<p>Yes      No</p>	<p>23. Did you incur any commuting to work costs such as E-Z Pass tolls, commuter or T passes? If so, what amount for</p>	<p>Yes      No</p>
<p>16. Did you purchase a new alternative technology vehicle or electric vehicle?</p>	<p>Yes      No</p>	<p>_____ Taxpayer      _____ Spouse</p>	
<p>17. Did you install any alternative energy equipment to your residence such as solar water heaters, or solar panels? Did you install any energy efficient improvements such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners ? If so, please provide details.</p>	<p>Yes      No</p>		

**Comments:**

To the best of my knowledge the information enclosed in this client tax organizer is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Taxpayer	Date	Spouse	Date