

Questions

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"/>
If yes, explain: _____		
Did you get married to a same-sex spouse in a state that legally recognizes same-sex marriage?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, explain: _____		
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 that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	<input type="checkbox"/>	<input type="checkbox"/>
Dependent Information		
Were there any changes in dependents from the prior year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, explain: _____		
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,000?	<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 any other person(s) other than your dependent children during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay for child care while you worked or looked for work?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any expenses related to the adoption of a child during the year?	<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 purchase rental property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire a new or additional interest in a partnership or S corporation?	<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 foreclose or abandon a principal residence or real property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you dispose of any stock during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please include a copy of any Forms 1099-B.		
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 lend money with the understanding of repayment and this year and it became totally uncollectable?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any debts canceled or forgiven this year, such as home mortgage or student loans?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?	<input type="checkbox"/>	<input type="checkbox"/>

Yes No

Income Information

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?	<input type="radio"/>	<input type="radio"/>
Did you receive any income from property sold prior to this year?	<input type="radio"/>	<input type="radio"/>
Did you receive any unemployment benefits during the year?	<input type="radio"/>	<input type="radio"/>
Did you receive any disability income during the year?	<input type="radio"/>	<input type="radio"/>
Did you receive tip income not reported to your employer this year?	<input type="radio"/>	<input type="radio"/>
Did any of your life insurance policies mature, or did you surrender any policies?	<input type="radio"/>	<input type="radio"/>
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	<input type="radio"/>	<input type="radio"/>
Do you expect a large fluctuation in income, deductions, or withholding next year?	<input type="radio"/>	<input type="radio"/>

Retirement Information

Are you an active participant in a pension or retirement plan?	<input type="radio"/>	<input type="radio"/>
Did you receive any Social Security benefits during the year?	<input type="radio"/>	<input type="radio"/>
Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	<input type="radio"/>	<input type="radio"/>
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	<input type="radio"/>	<input type="radio"/>
Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	<input type="radio"/>	<input type="radio"/>

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?	<input type="radio"/>	<input type="radio"/>
Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent?	<input type="radio"/>	<input type="radio"/>
Did anyone in your family receive a scholarship of any kind during the year?	<input type="radio"/>	<input type="radio"/>
Did you make any withdrawals from an education savings or 529 Plan account?	<input type="radio"/>	<input type="radio"/>
Did you pay any student loan interest this year?	<input type="radio"/>	<input type="radio"/>
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	<input type="radio"/>	<input type="radio"/>
Did you make any contributions to an education savings or 529 Plan account?	<input type="radio"/>	<input type="radio"/>

Health Care Information

Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for every month of the year for your family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent.	<input type="radio"/>	<input type="radio"/>
Did anyone in your family qualify for an exemption from the health care coverage mandate?	<input type="radio"/>	<input type="radio"/>
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, please provide any Form(s) 1095-A you received.	<input type="radio"/>	<input type="radio"/>
Did you make any contributions to a Health savings account (HSA) or Archer MSA?	<input type="radio"/>	<input type="radio"/>
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	<input type="radio"/>	<input type="radio"/>
Did you pay long-term care premiums for yourself or your family?	<input type="radio"/>	<input type="radio"/>
If you are a business owner, did you pay health insurance premiums for your employees this year?	<input type="radio"/>	<input type="radio"/>

Yes No

Itemized Deduction Information

- Did you incur a casualty or theft loss or any condemnation awards during the year? Yes No
- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)? Yes No
- Are you claiming any cash or noncash charitable contributions without a receipt? Yes No
- The IRS does not allow charitable deductions for donations that cannot be substantiated by a canceled check, record of payment, or charitable receipt.
- Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgement from the donee organization. Yes No
- Did you have an expense account or allowance during the year? Yes No
- Did you use your car on the job, for other than commuting? Yes No
- Did you work out of town for part of the year? Yes No
- Did you have any expenses related to seeking a new job during the year? Yes No
- Did you make any major purchases during the year (cars, boats, etc.)? Yes No
- Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax? Yes No

Miscellaneous Information

- Did you make gifts of more than \$14,000 to any individual? Yes No
- Did you engage in any bartering/trade transactions? Yes No
- Did you retire or change jobs this year? Yes No
- Did you incur moving costs because of a job change? Yes No
- Did you pay any individual as a household employee during the year? Yes No
- Did you make energy efficient improvements to your main home this year? Yes No
- Did you receive a distribution from, or were you a grantor or transferor for a foreign trust? Yes No
- Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country? Yes No
- Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity? Yes No
- Did you receive correspondence from the State or the Internal Revenue Service? If yes, please attach copies. Yes No
- Did you receive an Identity Protection PIN from the Internal Revenue Service or have you been a victim of identity theft? If yes, attach the IRS letter. Yes No