



Name(s) on return: _____ Phone #: _____

E-Mail Address: _____ Opt out of our newsletter:

- Did your address or phone number change? If yes, what is your new address or phone number?..... Yes No

- Did your filing status change? If yes, why?..... Yes No

- Was there any change in your dependents? If yes, who needs to be added or deleted?..... Yes No

Name: _____ DOB: _____ SS#: _____

- Were you and all your dependents or possible dependents covered by health insurance all year? Please provide all Forms 1095 received with you documents. If no, please provide details of any lapses in coverage for you and your dependents..... Yes No

- Did you make energy efficient improvements to your home or purchase any energy-saving property during the tax year? If yes, please attach details..... Yes No

- If you engage in a business or trade or have rentals or a farm, were you required to send forms 1099?.....N/A Yes No
If yes, did you send them to the recipients and file them with the IRS?.....Yes No

- If you file a State Return, did you make any out of state or internet purchases on which no sales tax was collected? If yes, please provide details of product and amount in your documents.....N/A Yes No

- Did you purchase a motor vehicle or boat during the tax year? If so, please provide sales tax paid. Also please provide any property taxes or car tags paid in your documents (only applicable if you itemize your deductions).....N/A Yes No

- Did you make or do you plan to make any contributions to an IRA, Roth IRA, SEP, Solo 401(k), etc., outside of payroll deductions on your W-2 for tax year 2016?..... Yes No

- Did you buy, sell, refinance, or abandon a principal residence or other real property (attach copies of any escrow statements or Forms 1099)?..... Yes No

- Did you or your spouse make gifts of over \$14,000 to an individual or contribute to a prepaid tuition plan or make a gift of any amount to a trust?..... Yes No

- Do you expect any changes to your income or deductions for 2017 (retirement, job change, etc.)? If yes, please explainYes No

- Did you make any estimated tax payments for 2016? If yes, please provide amounts paid:..... Yes No

Date: _____ Amount: _____ Date: _____ Amount: _____

Date: _____ Amount: _____ Date: _____ Amount: _____

- If you get a refund, do you want to use direct deposit? If yes, please provide bank information:..... Yes No

Financial Institution: _____ Checking or Savings

Routing #: _____ Account #: _____

FOREIGN INCOME, ASSETS, AND TAXES:

- Did you have any foreign income or pay any foreign taxes?..... Yes No

- At any time during the tax year, did you have an interest in or a signature or other authority over a bank account or other financial account in a foreign country or were you a grantor to a foreign trust?..... Yes No

- Did you at any time during the tax year, have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnerships, interests, etc.) held in foreign financial institutions that exceeded \$50,000 in value at any time during the year?..... Yes No

SIGNATURE: _____

DATE: _____