



Name(s) on return: \_\_\_\_\_

Phone #: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Please check the appropriate box and include all necessary details and documentation.

YES NO

**Personal Information**

Did your filing status change during the year?.....  YES  NO  
If yes, explain:

Did your address or phone number change from last year?.....  YES  NO  
If yes, updated info:

**Dependent Information**

Were there any changes in dependents from the prior year?.....  YES  NO  
If yes, explain:

New dependent  
Name: \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

**Income Information**

Did you sell, exchange, or purchase any real estate during the year? (provide copies of closing statements/1099s) .....  YES  NO

Do you expect a large fluctuation in income, deductions, or withholding next year?.....  YES  NO  
If yes, explain:

**Retirement Information**

Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, or Solo 401(k) outside of payroll deductions?.....  YES  NO

**Education Information**

Did you or any of your dependents make any payments for postsecondary education?.....  YES  NO  
If yes, provide all Forms 1098T

**Health Care Information**

Did you have qualifying health care coverage for your family? .....  YES  NO  
"Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent.  
If yes, attach any Form(s) 1095-B and/or 1095-C you received.

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act (the healthcare exchange)? .....  YES  NO  
If yes, attach all Form(s) 1095-A you received.

**Itemized Deduction Information**

**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? .....

Did you purchase a motor vehicle or boat during the year? If yes, please provide sales tax paid (if itemizing) .....

**Miscellaneous Information**

If you engage in a business or trade or have rentals or a farm, were you required to send Forms 1099? .....

If yes, did you send the required forms to the recipients and the IRS? .....

Did you make gifts of more than \$15,000 to any individual or contribute to a prepaid tuition plan, or make a gift of any amount to a trust? .....

Did you receive a distribution from or were you a grantor or transferor for a foreign trust? .....

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? .....

Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity? .....

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? .....

Did you have any sales or other exchanges of virtual currencies, or used virtual currencies to pay for goods or services, or are you holding virtual currencies as an investment? .....

**Tax Payments and Refunds**

Did you make any estimated tax payments? .....

If yes, please provide the dates and amounts paid:

\_\_\_\_\_

\_\_\_\_\_

If you get a refund, do you want direct deposit? .....

If so, please provide bank name, account type, routing number and account number

Bank Name: \_\_\_\_\_ Acc. Type: \_\_\_\_\_

Routing # \_\_\_\_\_ Acc. #: \_\_\_\_\_

**Electronic Communications**

Do you want to opt out of our newsletter? .....

Do you want to create a client portal to receive electronic copies of your tax returns? .....

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date