

Questions (Full Document Available Upon Request)

Personal Information.

Did your marital status change during the year?

Did you marry a same-sex spouse in a state that legally recognizes same-sex marriage?

Did your address change from last year?

Can you be claimed as a dependent by another taxpayer?

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?

Did you receive an Identity Protection PIN from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter.

Dependent Information.

Were there any changes in dependents from the prior year?

If yes, explain: _____

Do you have any children under the age of 19, or a full-time student under the age of 24 with unearned income in excess of \$3900? (Interests, dividends & capital gains).

Do you have dependent who must file a tax return?

Did you pay for child care while you worked or looked for work?

Did you provide over half the support for person(s) other than dependent children during the year?

Did you pay any expenses related to the adoption of a child during the year?

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.

Purchases, Sales and Debt Information.

Did you start a new business or purchase rental property during the year?

Did you acquire a new or additional interest in a partnership or S corporation?

Did you sell, exchange, or purchase any real estate during the year?

Did you purchase or sell a principal residence during the year?

Did you foreclose or abandon a principal residence or real property during the year?

Did you acquire or dispose of any stock during the year?

Did you take out a home equity loan this year?

Did you refinance a principal residence or second home this year?

Did you sell an existing business, rental or other property this year?

Did you lend money with the understanding or repayment and this year it became totally uncollectable?

Did you have any debts canceled or forgiven this year; home mortgage or student loan?

Did you purchase a qualified plug-in drive or fuel cell vehicle this year?

Did you pay any student loan interest this year?

Income Information.

Did you have any foreign income, accounts, or pay any foreign taxes during the year?

Did you receive a distribution from or were you a grantor or transferor for a foreign trust, or do you have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?

If yes, did the balance exceed \$10,000. Please file form TD F 90-22-1

Did you have a financial interest in or signature authority over a financial account such as bank accounts, securities account, or brokerage account, located in a foreign country?

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

Did you, your spouse, or your dependents receive any Social Security disability, Federal Assistance, State assistance, child support, Workman's Comp?

If yes, list dollar amounts and income you reported for the assistance.

Did you receive any income from property sold prior to this year?

Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?

Did you make any withdrawals from or contributions to IRA, Keogh, SIMPLE,

Sep or other qualified retirement plans?

► Print Name: _____ ► Signature: _____ Date: _____

Did you make any withdrawals from an education savings or 529 Plan account?
Did you receive any distributions from a Health Savings Account (HSA), Archer, or Medicare Advantage MSA this year?
Did you receive any child support or alimony during the year?
Did you receive any Social Security benefits during the year?
Did you receive any unemployment benefits during the year?
Did you receive tip income not reported to your employer this year?
Did any of your life insurance policies mature, or did you surrender any policies?
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?
Do you expect a large fluctuation in income, deduction, or withholding next year?

Itemized Deduction Information

Did you have any Mortgage Interest Paid during the year?
Did you pay State and Local real estate property taxes?
Did you incur a casualty or theft loss or any condemnation awards during the year?
Do you have evidence to substantiate charitable contributions?
Did you make any noncash charitable contributions (clothes, furniture, etc.)?
Did you donate a vehicle or boat during the year?
Did you have an expense account or allowance during the year?
Did you use your car on the job, other than commuting?
Did you work out of town for part of the year?
Did you have any expenses related to seeking a new job during the year?
Did you make any major purchases during the year (car, boat, etc.)?
Did you make any out-of-state purchases (by telephone, internet, mail, in-person) that the seller did not collect state sales or use tax?
Did you pay out-of-pocket medical expenses?

Health Care Information.

Did you make any contributions to a health saving account (HSA) or archer MSA?
Did you pay long-term health care premiums for yourself or your family?
Did you pay any COBRA health care coverage continuation premiums?
Are you a business owner and paid health insurance premiums for your employees?
Did anyone in your family qualify for an exemption from the health care coverage mandate?
Did you enroll for lower cost Marketplace Coverage through the healthcare.gov under the Affordable Care Act? If yes, please provide any Form(s) 1095-A you received.
Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for every month of 2014 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.

Miscellaneous Information.

Did you make gifts of more than \$14,000 to any individual?
Did anyone in your family receive a scholarship of any kind during the year?
Did you have any education expenses during the year?
Did you make any contributions to IRA, Roth, or other qualified retirement plan?
Did you make any contributions to an education savings or 529 plan account?
Did you utilize an area of your home for business purposes?
Did you retire or change jobs this year?
Are you an active participant in a pension or retirement plan?
Did you engage in any bartering transactions?
Did you incur moving costs because of a job change?
Did you, your spouse, or your dependents attend a post-secondary school during the year or plan to attend in the coming year?
Did you pay an individual as a household employee during the year?
Did you receive correspondence from the state or internal revenue service?

If yes, explain: _____

► Print Name: _____ ► Signature: _____

Date: _____