Tax Return Appointment Questionnaire

Client Name(s) ____Tax Year __________

Note: All questions pertain to **tax year 2018** unless otherwise specified.	**Yes**	**No**
1. Did you (or your spouse) make any gifts of over $15,000 (in cash or in fair market value) to an individual?	______	______
2. Did you make any major purchases such as a motor vehicle, boat, or mobile home?	______	______
3. Do you qualify to claim any **dependency** exemptions (children, parents, etc.)?	______	______
4. Are you (or your spouse) age 70½ or older?	______	______
5. Do you have any worthless stocks (not in retirement plans) or uncollectible bad debts?	______	______
6. Do you have any capital loss carryovers from tax year 2017?	______	______
7. Did you sell and/or purchase a home?	______	______
8. Did you receive any gambling winnings?	______	______
9. Did you make any federal estimated income tax payments?	______	______
10. Did you make any state estimated income tax payments?	______	______
11. Did you participate in your employer's **dependent (child) care** benefit plan (Flexible Spending Account, see W-2 Box 10)? **(NOT MEDICAL)**	______	______
12. Did you pay for adoption expenses?	______	______
13. If you have children under age 24, did any of them receive total **unearned** income (interest, dividends, capital gains, etc.) greater than $1,050?	______	______
14. Did you make any payments for long-term care insurance premiums?	______	______
15. Did you pay interest on a student loan?	______	______
16. Did you pay for college tuition?	______	______
17. Did you contribute to a Roth IRA? If not, would you like to?	______	______
18. Did you contribute (**not a Rollover**) to a Traditional IRA?If not, would you like to?	______	______
19. Did you convert a Traditional IRA to a Roth IRA?	______	______
20. Did you take money out of an IRA (Traditional, Roth and/or Education) or 401(k)?	______	______
21. Have you ever made a nondeductible (**Not Roth)** Traditional IRA contribution?	______	______
22. Does your outstanding **first mortgage** (originated before 12/15/17) balance(s) exceed $1,000,000?	______	______
23. Does your outstanding **first mortgage** (originated after 12/14/17) balance(s) exceed $750,000?	______	______
24. Do you have any **home loans** from which the proceeds **WERE NOT** used to buy, build, or substantially improve the home that secures the loan?	______	______
25. Are you or your spouse legally blind?	______	______

Tax Return Appointment Questionnaire (Continued)

Note: All questions pertain to tax year 2018 unless otherwise specified.	**Yes**	**No**
26. Did you refinance **and pay points**?	______	______
27. Did you own **ANY** cryptocurrency?	______	______
28. Did you make loan payments on a boat or recreational vehicle that has basic living accommodations such as sleeping space, a toilet and cooking facilities?	______	______
29. At any time during 2018, did you have a financial interest in or signature authority over a financial account in a foreign country?	______	______
30. If you answered yes to #29, did these foreign assets exceed $50,000 ($100K if MFJ) on the last day of 2018 or more than $75,000 ($150K if MFJ) at any time during the year?	______	______
31. If you get a refund, do you want your refund deposited directly into your bank acct?	______	______
32. If you are due a refund, do you want to credit it to next year's tax?	______	______
33. **If you are under age 59 ½**, did you withdraw any money from an IRA and use it to purchase a home, pay for higher education expenses, pay for medical expenses or pay for health insurance?	______	______
34. Did you contribute any money to or take money out of a **Health Savings Account** (**HSA**) **(**not a flexible spending account (FSA)**)**?	______	______
35. Will any of your **dependent** children be filing their own tax return this year?	______	______
36. Did you pay alimony during the tax year in question?	______	______
37. Did you receive alimony during the tax year in question?	______	______
38. Did you have any debt that was cancelled, forgiven and/or discharged?	______	______
39. Did you transfer an IRA distribution directly to a qualifying charitable organization?	______	______
40. Did you claim a first-time homebuyer credit on your 2008 tax return?	______	______
41. Did you receive a Premium Tax Credit under the Affordable Care Act?	______	______
42. Did you pay more than $250 in tuition, book fees (**rental only** – not purchase) and/or lab fees to an **Illinois** School for a **child in kindergarten through 12th grade**?	______	______
43. Did you contribute to the **Illinois Bright Start**, **Bright Directions** and/or **College Illinois** college savings plans?	______	______
44. Did you participate in the **Illinois Invest in Kids** tax credit program?	______	______
45. Did you receive any money from a legal settlement?	______	______
46. Are you reporting all of the income you received?	______	______
47. Did you make any purchases subject to state use tax reporting and payment?	______	______

Please note: Your conversations with me are not covered by attorney-client privilege. Therefore, an expectation of confidentiality between me and the IRS cannot exist. Consequently, the IRS can compel me to reveal anything that you disclose to me.

____ ____________________

Client Signature **Date**

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