



# 2017 Tax Questionnaire

Please return this questionnaire with your tax data or bring it to your appointment.

Name(s) \_\_\_\_\_ Address \_\_\_\_\_

\_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Cell Phone (\_\_\_\_) \_\_\_\_\_ Home Phone (\_\_\_\_) \_\_\_\_\_ Email \_\_\_\_\_

(\_\_\_\_) \_\_\_\_\_ (\_\_\_\_) \_\_\_\_\_

In an effort to ensure you pay the lowest possible taxes, please take a few minutes to complete this questionnaire. The answers to these questions will help us ensure that you receive all possible deductions and credits that you are eligible for.

Yes No

**Did you change any bank accounts that have been used for direct deposit? If so, please attach a voided check.**

**Yes No PERSONAL INFORMATION**

- Did your marital status change during the year?
- If yes, did you change your name with the Social Security Administration?
- Did your address change from last year? If so, please fill out the address section above.
- Can you be claimed as a dependent by another taxpayer?

**Yes No DEPENDENT INFORMATION**

- Were there any changes in dependents from the prior year?
- Did you pay for childcare while you worked or looked for work?
- Did you pay for childcare expenses through your employer's flexible spending plan?
- Did you provide over half the support for a parent or non-relative?

**Yes No PURCHASES, SALES, AND INHERITANCE**

- Did you purchase or sell any real estate, partnership, or corporation interest this year?
- Did you dispose of any stock during the year (other than stock held in your retirement account)?
- Did you inherit property in 2017?
- Did you purchase a vehicle in 2017?

**Yes No ITEMIZED WRITTEN INFORMATION**

- Do you have written evidence to substantiate charitable contributions?
- Did you make any non-cash charitable contributions (clothes, vehicle, etc.)?
- Did you use your car on the job (other than commuting)?
- Do you have written evidence to support business use of your vehicle?
- 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.)?

**Yes No MISCELLANEOUS INFORMATION**

- Did you have qualifying healthcare for you, your spouse, and your dependents for every month in 2017?
- Did you make any out-of-state purchase for which the seller did not collect state sales or use tax?
- Did you have any educational expenses during the year?
- Did you make any contributions to an education savings or 529 Plan account?
- Did you participate in a Health Savings Account (HSA) or Archer MSA?
- Did you make energy efficient improvements to your main home this year (solar energy systems, geothermal heat pumps, wind turbines, or fuel cells)?
- Do you have any foreign bank accounts?

Your Signature \_\_\_\_\_ Date \_\_\_\_\_