2018 General Tax Questionnaire

Please check if "Yes" and provide documentation, if possible.

- [ ] 1. Did you complete the Client Information Sheet included in this packet?
- [ ] 2. Dependents qualify for a tax credit. Answer all the questions about each person in your household on the Client Info Sheet.
- [ ] 3. Did you have any children under 19 (or 24 if a full-time student) who received more than $1,050 in investment income?
- [ ] 4. Did you provide over half of the support for another person (or persons) during the year (other than dependent children)?
- [ ] 5. Please include Forms W2 reporting wages from all employers.
- [ ] 6. Please include Forms 1099INT reporting interest income received.
- [ ] 7. Please include Forms 1099DIV reporting dividend income received.
- [ ] 8. Please include all year end Broker Statements, Form 1099B as well as additional forms such as 1099INT, 1099DIV, etc.
- [ ] 9. Did you sell or trade virtual currency, i.e. Bitcoin, Cryptocurrency, Ethereum, etc.? If yes, we will contact you for more information.
- [ ] 10. Did you receive payments from a pension or profit-sharing plan? If yes, please provide Forms 1099R.
- [ ] 11. Did you receive any distributions from an IRA or other qualified plan? If yes, please provide Forms 1099R.
- [ ] 12. Did you receive any disability or social security income? If yes, provide Forms SSA-1099.
- [ ] 13. Did you purchase or sell a principal residence? If yes, please provide Form 1099S.
- [ ] 14. Did you claim a First-time Homebuyer Credit for a home purchased in 2008?
- [ ] 15. Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit?
- [ ] 16. Did you receive proceeds from an installment sale? If yes, we will contact you for more information.
- [ ] 17. Did you receive interest from a bank account or other financial account based in a foreign country?
- [ ] 18. Were you the grantor of or transferor to a foreign trust? If yes, we will contact you for more information.
- [ ] 19. Did you make gifts of more than $15,000 to any one person? If yes, we will contact you for more information.
- [ ] 20. Were any payments made on student loans? If yes, please provide Form 1098-E Student Loan Interest Statement.
- [ ] 21. Did you pay any educational tuition or fees for you or a dependent? If yes, please provide Form 1098T for each college student.
- [ ] 22. Did you purchase a 'clean fuel' or electric hybrid vehicle in 2018? If yes, did you apply for the credit using Form TC-40V?
- [ ] 23. Did you refinance a mortgage or take out a home equity loan? If yes, we will contact you for more information.
- [ ] 24. Please include all Property Tax Statements.
- [ ] 25. Did you make any contributions to an HSA (Health Savings Account) in 2018? If yes, please provide Form 5498-SA.
- [ ] 26. Did you use money from an HSA (Health Savings Account) in 2018? If yes, please provide Form 1099SA.
- [ ] 27. Were any contributions made to a traditional or Roth IRA for 2018? if yes, please provide Form 5498 if available or the amount.
- [ ] 28. Did you make or receive Alimony payments? If yes, please provide the amounts.
- [ ] 29. Did you receive Unemployment compensation? If yes, please provide Form 1099G.
- [ ] 30. Include a list of all cash and non-cash charitable contributions. Please include receipts from charitable organizations.
- [ ] 31. Did you pay child or Dependent Care Expenses? If yes, please provide statement of amounts paid and to whom.
- [ ] 32. Do you recall what our sign said the last time you were in our office? If yes, write it in the space below.

- [ ] 33. Did you make estimated tax payments? If yes, please provide us with the amount paid, the date, and to what agency.

Business and Investment Questions

- [ ] 1. Did you receive stock from a stock bonus plan with your employer?
- [ ] 2. Did you buy or sell any bonds?
- [ ] 3. Did you surrender any U.S. savings bonds?
- [ ] 4. Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S-Corporations?
- [ ] 5. Did you include all income received for the business? Include Forms 1099-MISC and Forms 1099K, if any are received.
- [ ] 6. Did you itemize out all business expenses?
- [ ] 7. Did you sell any property or equipment? If yes, what, when, how much? Is the sale on installments?
- [ ] 8. Did you make any contributions to a Keogh or a self-employed SEP, SIMPLE or Qualified plan?
- [ ] 9. Include all K1's received for Partnerships, S-Corporations, or Trusts not prepared by Preferred Accounting.
- [ ] 10. Do you own a rental property? If yes, did you include all income and expenses?
- [ ] 11. Did you include total miles for business use vehicles and the miles used for business?
- [ ] 12. Did you include information for business use of a home?