

Questions-All Taxpayers

Name of the Taxpayer: _____

“You” refers to both taxpayer and spouse. Enter “?” if unsure about a question.				(Provide related statements or other documentation.)	
Yes	No	Not Sure	Questions	If yes, please briefly explain.	Documents needed
			Did your marital status change?		
			Are either you or your spouse legally blind?		
			Did you pay or receive alimony in 2019?	Paid/Received: \$ Recipient’s SS#:	
			Did you have health insurance for you, your spouse, and all dependents?	Who is paying the premiums?	Form 1095 and final pay stub.
			Did you have health insurance full year?	Annual: \$	
			Did you pay for long-term care insurance?	Annual: \$	
			If you were on Medicare, did you have a supplemental health insurance?		
			Will there be any significant changes in income or deductions next year, such as retirement?		
			Did you pay anyone for domestic services in your home?	When: Who: What for: How much:	
			Did you purchase a new fully electric car?		Receipt
			Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?		
			Are you a citizen of a foreign country?		
			Did you live in a foreign country in 2019 (vacations excluded)?	How many days:	
			Did you own or have signing authority in a foreign bank or financial account?		
			Is there anybody else besides you and your spouse living in the house?	Who: How many days:	
			Did you received any awards or legal settlement resulting from the lawsuit?		Settlement agreement, 1099
			Were any children born or adopted in 2019?		SSN card, birth certificate
			Were any children attending college in 2019?	Year in college: Tuition: \$ Books: \$ Other: \$	Receipt for all tuition, books, course related expenses, 1098-T
			Did you pay any student loan interest?		1098-E
			Do you have any children who earned more than \$2100 of investment income?		

		Did you pay for child or dependent care so you could work or go to school? (For each child please separately provide name)	Receipts
		Did you, or will you, contribute any money to an IRA for 2019?	Receipt or statement
		Did you sell any personal property with a profit?	
		Did you sell or receive any payments from real estate, rental or investment property?	Closing statement
		Did you have any investment become worthless or were you a victim of investment theft in 2019?	
		Were you granted, or did you exercise, any employee stock options during 2019?	
		Did you pay any interest on a loan for a boat or RV that has living quarters?	Financial Institution: Address: EIN: Interest: \$
		Did you pay any property tax for the house under your name during 2019?	Amount: \$ Receipts
		Did you pay sales taxes on a major purchase in 2019, such as a vehicle, boat, or home?	Amount: \$ Closing statement
		Did you make any cash, check or credit card donation to the charity? If over \$250, provide receipts and proof of payment.	Amount: \$ Receipts
		Did you make any non-cash contribution? If over \$500, please provide detailed description for each donation.	Amount: \$ Receipts
		Did you have any uninsured loss to your property in 2019?	
		Did you work from a home office?	
		Did you use car for business?	
		Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?	K1
		Did you purchase or sell a home during the year?	Closing statement
		Did you refinance a mortgage or take a home equity loan?	Closing statement
		Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?	
		Do you have a current mortgage loan? If yes, how did you use the funds?	1098

2019 Estimated Tax Payments (Amount and Date mm/dd/yyyy)

Tax payments	Q1	Q2	Q3	Q4
Federal	\$ ____/____/2019	\$ ____/____/2019	\$ ____/____/2019	\$ ____/____/2020
State	\$ ____/____/2019	\$ ____/____/2019	\$ ____/____/2019	\$ ____/____/2020