

2019
TAX QUESTIONS

(Please complete and return this form with your tax information)

Name: _____

Cell # _____

Cell # _____

Home# _____

Work# _____

Circle one

- Yes or No Did you have any transactions in a virtual currency such as Bitcoin?**
- Yes or No Do you own any assets (land, bank accounts, etc.) in a Foreign Country or Foreign Bank, or receive any funds or gifts from a Foreign Country?**
- Yes or No Did all members of the household have health insurance for all twelve months? If No, please indicate who is covered and for which months.
- Yes or No Did your address change during the year?
- Yes or No Did your marital status change during the year?
- Yes or No Were any children born or adopted this year?
- Yes or No Did any children start college **or** move out of your household this year?
- Yes or No Did any parents live with you or did you provide financial support for them during the year?
- Yes or No Is anyone in the family totally disabled? If so, do they receive disability income?
- Yes or No Did you receive an inheritance, alimony, jury duty, or lottery winnings?
- Yes or No Did you begin or end a farm or business or an investment in a Partnership, LLC, or S-Corp?
- Yes or No Were any stocks, bonds, or other investment property sold during the year?
- Yes or No Did you purchase, sell or refinance any real estate this year (*settlement sheet needed*)?
- Yes or No Did you receive a distribution from a 401(K), profit-sharing plan, retirement plan, or individual retirement account (including Traditional, Roth, and Education IRAs)?
- Yes or No Did you convert from or contribute to a Traditional, Roth, Regular or Education IRA?
- Yes or No Did you contribute to a Health Savings Account (HSA)?
- Yes or No Was your home rented out or used for business during the year?
- Yes or No Did you add energy efficient improvements to your home this year (*Receipts are needed*)?
- Yes or No Were any gifts made to an individual or trust that totals more than \$15,000 for the year?
- Yes or No Did any children have investment (interest, dividends, etc.) income more than \$1,100?
- Yes or No Were you notified or audited by either the Internal Revenue Service or a State taxing agency?

(Please See Other Side)

2019 TAX FORMS AND INFORMATION NEEDED

- ✓ **1095A** from the Health Insurance Exchange or documentation of health insurance.
- ✓ **1095B** from your Health Insurance Company
- ✓ **1095C** from your Employer (if they employed over 50 people)

- ✓ W-2's from all Employers

- ✓ 1099-INT, 1099-DIV, 1099-R, 1099-SSA, 1099-S and/or 1099-MISC

- ✓ 1099-B and Cost Basis for each stock/bond sale.

- ✓ **1098-T AND proof of payment and receipts for books, tuition, and required fees paid for college.**

- ✓ 1098-E and/or statement of student loan interest paid.

- ✓ 1098's for mortgage interest and real estate taxes paid *or real estate bill for non-escrow accounts.*

- ✓ **Settlement sheets (HUD-1 Forms)** from the purchase, sale, or refinance of any real estate.

- ✓ List of unreimbursed medical expenses including, doctor, dentist, hospital, nursing homes, prescriptions, hearing aids, eye care, medical supplies, medical miles driven, and health and long term care insurance premiums.

- ✓ Summary of charitable donations **for which there are receipts**, and charitable miles driven.

- ✓ *Statement from Child Care Provider including the amount paid, name, address and tax ID# or Social Security Number of the provider.*

- ✓ Listing of unreimbursed teaching/education supplies.

- ✓ Miles driven for business/rental (**NOT** including to and from work) vehicle make and model _____
 Total Miles for 2019 _____ Business Miles for 2019 _____.

- ✓ Estimated Tax Payments made:

Federal		Due Date	State	
Date Paid _____	\$ _____	4/15/19	Date Paid _____	\$ _____
Date Paid _____	\$ _____	6/15/19	Date Paid _____	\$ _____
Date Paid _____	\$ _____	9/15/19	Date Paid _____	\$ _____
Date Paid _____	\$ _____	1/15/20	Date Paid _____	\$ _____

If you have income from New Jersey, Pennsylvania, New York, or Virginia please provide your local town/municipality and school district information.

Comments/Other Information: