

Miscellaneous Information

Name: _____

SSN: ***-**-0000

Personal Information

Yes No

 Did your marital status change during the year?

If "Yes," explain _____

 Can you or your spouse be claimed as a dependent by someone else?

 Did your address change during the year?

Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)

Dependent Information

 Did you have any changes in dependents during the year?

If "Yes," explain _____

 Can another person qualify to claim any dependents?

 Did you have any childcare expenses during the year?

 Did you have any adoption expenses during the year?

 Did you have any children under age 19 or a full-time student under age 24 with more than \$2100 of unearned income?

Provide documentation for proof of dependent related credits (school records, medical records, daycare records, etc.)

Health Care Information

 Did any member of your household **NOT** have healthcare coverage for the entire year?
Provide copies of all Forms 1095-A, 1095-B, 1095-C for **ALL** members of your household.

If any member of your household received an exemption from the marketplace, provide the Exemption Certificate Number (ECN).

 Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

Income, Purchases, Sales, and Debt Information

 Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?

 Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?

 Did you have any income from, or pay taxes to, a foreign country?

 Did you own property in a foreign country?

 Did you receive any tips not reported to your employer?

 Did you receive any disability income during the year?

 Did you cash any U.S. savings bonds during the year?

 Did you receive any other income not provided with this organizer?

If "Yes," explain _____

 Did you start a new business or purchase any rental property during the year?

 Did you sell an existing business, rental property, or other property during the year?

 Did you purchase any business assets or convert any assets to business use?

If "Yes," provide the cost of the asset, the date it was placed in service, and business use percentage.

 Did you purchase any gasoline, diesel, or special fuels for non-highway business use?

 Did you buy or sell any stocks, bonds, or other investments during the year?

 Did you sell a principal residence during the year?

If "Yes," provide closing documentation for the purchase and sale of the home

 Did you foreclose or abandon a principal residence or real property during the year?

 Did you refinance your principal home or second home or take out a home equity loan during the year?

If "Yes," provide all escrow, closing, and other pertinent documentation and information.

 Did you receive any principal or interest during this year from property sold in prior years?

 Did you rent out your home or use it for business?

 Did you sell, exchange, or purchase any real estate during the year?

 Did you acquire a new or additional interest in a partnership or S corporation?

 Did you have any debts canceled or forgiven this year?

 Does anyone owe you money that has become uncollectible?

 Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?

If "Yes," provide the year, make, model, VIN, and date the vehicle was placed in service.

Itemized Deduction Information

 Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?

 Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?

 Did you receive any state or local income tax refunds from prior years?