

Questionnaire

Name: _____

SSN: ***-**-****

Questionnaire

Sharing Economy

Yes No

- Did you receive income or incur expenses associated with (e.g., Etsy, Facebook, Craig's List)?
If so, provide documentation.
- Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?
If yes, attach Form 1099-MISC and Form 1099-K.
- Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?
If yes, attach Form 1099-K.
- Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb or HomeAway)?
If yes, provide documentation.

Additional Questions

Yes No

- Did you receive any wages? Bring in all W-2s with your packet.
- Did you receive any interest income? Bring in your 1099-INTs with your packet.
- Did you receive any dividend income? Bring in your 1099-DIVs with your packet.
- Did you receive any unemployment compensation during the year?
- Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- Did you receive any nontaxable income during the year? (e.g., child support)
- Did you convert any part of a traditional, SEP, or SIMPLE IRA to a Roth IRA? If so, bring in your documentation with your packet.
- Did you incur any expenses working as a teacher, counselor, or principal for classes kindergarten through grade 12?
- Did you pay for private elementary or secondary education expenses? If so, bring in your documentations.
- Did you pay or receive any alimony?
- Did you receive a first time home buyers credit for a home purchased in 2008?
- Did you purchase any items on which you didn't pay sales tax? If so, please provide us with the amount of purchases.
\$ _____
- Wisconsin - Did you pay rent for your principal residence? If so, did you pay the heat? _____ How much rent did you pay for the year? \$ _____
- Are you or your spouse a 100% disabled vet?
- Did your bank information change since you filed your last tax return? If so, please provide us with your current bank information.
- Did you receive income associated with a fantasy football league?
If yes, provide documentation.
- Did you incur casualty losses due to a federally recognized natural disaster?
- Do you anticipate your income or withholdings to be different for 2018?

Newsletters

Each year, we update our records regarding our MFS newsletters. Do you want them mailed to you? _____

or

Do you want them emailed to you?

If so, please provide us with your current email address. Even if you gave it to us last year, please provide it again.

Please write legibly.
