

QUESTIONNAIRE

Client Info

Yes No

- ☐ ☐ Did your marital status change during the year?
If 'yes', please explain _____
- ☐ ☐ Can you or your spouse be claimed as a dependent by someone else?
- ☐ ☐ Did your address change during the year?
If 'yes', please provide your current address _____
- ☐ ☐ Are you or your spouse a 100% disabled vet?
- ☐ ☐ Did your bank info change since you filed your last tax return?
If 'yes', please provide us with your current bank info. _____
- ☐ ☐ Do you want to have any refund directly deposited to the above banking account?
- ☐ ☐ Do you want to have any balance due directly withdrawn from the above banking account?
- ☐ ☐ Were you, your spouse, or any dependents a victim of identity theft?
If 'yes', please explain _____
- ☐ ☐ Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?
If 'yes', provide Notice CP01A from the IRS.

New Clients: Provide proof of identity to be eligible to e-file your tax return (driver's license and social security card)

Provide the best email address for us to contact you if we have any questions during our review of your tax documents.

Dependent Info

Yes No

- ☐ ☐ Did you have any changes in dependents during the year?
If 'yes', please explain _____
- ☐ ☐ Can another person qualify to claim any of your dependents?
If 'yes', which provide us with documentation. _____
- ☐ ☐ 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 the age of 24 with more than \$2,200 of unearned income?

For earned income credits, we need you to provide documentation for proof of dependent related credits (school records, medical records, daycare records, etc.)

Health Care Info

Yes No

- ☐ ☐ Did any members of your household have healthcare coverage through the Marketplace?
If 'yes', provide copies of Form 1095-A.
- ☐ ☐ Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, of Medicare Advantage MSA during the year? If yes, provide documentation for proof of distribution.
- ☐ ☐ Did you make any contributions to a Health Savings Account (HSA), Archer MSA, of Medicare Advantage MSA during the year? If yes, provide documentation for proof of contribution.

Income Info

Yes No

- ☐ ☐ Did you receive any wages? Bring in all W-2's with your packet.
- ☐ ☐ Did you receive any interest income? Bring in all 1099-INT's with your packet.
- ☐ ☐ Did you receive any dividend income? Bring in all 1099-DIV's with your packet.
- ☐ ☐ Did you receive any unemployment compensation during the year? Bring in your tax form.
- ☐ ☐ Did you receive any nontaxable income during the year? (i.e. child support)

Income Info (Continued)

Yes No

- ☐ ☐ Did you receive any income associated with Etsy, Facebook, Craigslist, Upwork, TaskRabbit, Poshmark, ThredUp etc.? Provide documentation.
- ☐ ☐ Did you receive any income associated with car sharing (Lyft, Uber, Doordash, etc.)? Provide documentation.
- ☐ ☐ Did you receive, sell, send, exchange, or otherwise acquire any financial interest in virtual currencies?
- ☐ ☐ Did you receive any income associated with crowdfunding (Kickstarter, Indiegogo, etc.)? Provide documentation.
- ☐ ☐ Did you receive any income associated with short-term rentals (Airbnb, HomeAway, VRBO, etc.)? Provide documentation.
- ☐ ☐ Did you receive any income associated with a fantasy football league? Provide documentation.
- ☐ ☐ 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 state or local income tax refunds from prior years?
- ☐ ☐ Did you receive any other income not provided with this organizer?
If 'yes', please explain _____

Purchases, Sales, and Debt Info

Yes No

- ☐ ☐ Did you purchase a principal residence during the year?
If 'yes', provide the closing documentation for the purchase of the property.
- ☐ ☐ Did you sell a principal residence during the year?
If 'yes', provide the closing documentation for the sale of the property.
- ☐ ☐ Did you have a principal residence or a piece of real property foreclosed on during the year?
- ☐ ☐ Did you abandon a principal residence or a piece of real property during the year?
- ☐ ☐ Did you refinance your principal home or 2nd home or take out a home equity loan during the year?
If 'yes', provide all escrow, closing, and other pertinent documentation or information.
- ☐ ☐ Did you receive any principal or interest during the year from property sold in prior years?
- ☐ ☐ Did you rent out your home or use it for business?
- ☐ ☐ Did you receive a first time home buyers credit for a home purchased in 2008?
- ☐ ☐ Did you start a new business during the year? _____
- ☐ ☐ Did you sell an existing business during the year? _____
- ☐ ☐ Did you purchase any rental properties during the year? _____
- ☐ ☐ Did you sell any rental properties during the year? _____
- ☐ ☐ Did you purchase any other properties during the year? _____
- ☐ ☐ Did you sell any other properties during the year? _____
- ☐ ☐ Did you purchase any business assets or convert any assets to business use?
If 'yes', provide the cost of the assets, the date placed in service, and the percentage of business use.
- ☐ ☐ Did you purchase any gasoline, diesel, or special fuels for **non-highway business use**?
- ☐ ☐ Did you use your home for business?
- ☐ ☐ Did you buy any stocks, bonds, or other investments during the year?
- ☐ ☐ Did you sell any stocks, bonds, or other investments during the year?
- ☐ ☐ Did you acquire a new or additional interest in a partnership or S corporation?
- ☐ ☐ Did you have any debts cancelled or forgiven during the year?
- ☐ ☐ Did anyone owe you money that has become uncollectible?
If yes, please provide dollar amount and the demand letter.
- ☐ ☐ 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 Info

Yes No

- ☐ ☐ Did you pay out-of-pocket (not paid with flex spending or HSA accounts) medical or dental expenses (premiums, prescriptions, doctors, hospitals, eyeglasses, mileage, etc.) during the year?
- ☐ ☐ Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year? If 'yes', provide premiums paid per person.
- ☐ ☐ Did you make any major purchases (vehicle, boat, etc.) during the year? If 'yes', provide all pertinent documentation or information.
- ☐ ☐ Did you pay any real estate property taxes or personal property taxes during the year?
- ☐ ☐ Did you pay mortgage interest during the year?
- ☐ ☐ Did you make any cash donation to charities during the year? If 'yes', provide the amount _____
- ☐ ☐ Did you make any noncash donations to charities (clothes, furniture, etc.) during the year? If 'yes', provide the documentation including the date of donation, approximate cost for each donation, the approximate value at time of each donation, and the name of the charitable organization.
- ☐ ☐ Did you donate a boat or vehicle during the year? If 'yes', attach Form 1098-C.
- ☐ ☐ Did you have any gambling winnings or losses during the year? Provide documentation.
- ☐ ☐ Did you incur casualty losses due to a federally recognized natural disaster?

Retirement Info

Yes No

- ☐ ☐ Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year? If 'yes', provide all 1099-R forms.
- ☐ ☐ Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), myRA, or other qualified retirement plan during the year? If 'yes', provide all 1099-R Forms.
- ☐ ☐ Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), myRA, or other qualified retirement plan during the year?
- ☐ ☐ Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- ☐ ☐ Did you convert any part of a traditional, SEP, or SIMPLE IRA to a Roth IRA? Provide documentation.
- ☐ ☐ Did you receive any Social Security benefits during the year? If 'yes', please bring your tax document.

Education Info

Yes No

- ☐ ☐ Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)? If 'yes', please provide your 1098-T forms.
- ☐ ☐ Did anyone in your household attend a post-secondary school during the year?
- ☐ ☐ Did you make a contribution to an Education Savings Account or Qualified Tuition Program during the year?
- ☐ ☐ Did you receive a distribution from an Education Savings Account or Qualified Tuition Program during the year? If 'yes', please provide your 1099-Q Forms.
- ☐ ☐ Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?

Estimate Info

Yes No

- ☐ ☐ Did you apply an overpayment of your 2019 taxes to your 2020 estimated taxes?
- ☐ ☐ If you have an overpayment of your 2020 taxes, do you want the refund applied to your 2021 taxes?
- ☐ ☐ Did you make any estimated payments toward your 2020 taxes? Please provide this information.

State Info

Yes No

- ☐ ☐ Did you purchase any items on which you didn't pay sales tax?
If 'yes', please provide the total amount of those purchases. \$ _____
- ☐ ☐ **Wisconsin Residents:** Did you pay for private elementary or secondary education expenses?
If 'yes', please provide documentation including grade.
- ☐ ☐ **Wisconsin Residents:** Did you pay rent for your principal residence?
If 'yes', how much rent did you pay for the year? \$ _____.
Did the rent include heat? _____

Foreign Account Info

Yes No

- ☐ ☐ 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 transfer 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 the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?

Miscellaneous Info

Yes No

- ☐ ☐ Did you incur any expenses working as a teacher, counselor, or principal for classes kindergarten through grade 12?
- ☐ ☐ Did you pay or receive any alimony?
- ☐ ☐ Did you incur a gain or loss due to damaged or stolen property?
If 'yes', provide the date of the incident, value of the property, and amount of insurance reimbursements.
- ☐ ☐ Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?
- ☐ ☐ Did you make gifts to any one person in excess of \$15,000 during the year?
If 'yes', are you splitting the gift with your spouse? _____
- ☐ ☐ Did you make any energy-efficient improvements to your main home during the year?
If 'yes', please provide documentation.
- ☐ ☐ Are you a business owner who paid health insurance premiums for your employees during the year?
- ☐ ☐ Did you receive any notices from the IRS or State taxing authorities last year?
If 'yes', please provide them with your packet.
- ☐ ☐ May the IRS discuss your tax return with your preparer?

Would you like a copy of your tax return:

- ☐ Emailed to you
- ☐ Printed for you
- ☐ Emailed and printed for you

Newsletters

Each year we update our records regarding our MFS newsletters.

Yes No

- ☐ ☐ Do you want the newsletter mailed to you?

OR

- ☐ ☐ Do you want the newsletter emailed to you?
If 'yes', provide the current email address.

Even if you provided it last year, provide again this year and please print legibly:
