The following questions MUST be answered for the year 2019

Client Name(s)_______________________________Date(s) of Birth_________
Email Address_________________________ Phone #_____________________

1. Marital Status: Married____ Single_____ Widowed_____ **Divorced_____ **Separated_____
**If Divorced or Separated: Original date of divorce or separation agreement________________
**Alimony paid $___________ or received in 2019 $____________

2. List everyone else who lived in your home in **2019** incl. spouse (continue on other side if necessary)

Name	Date of Birth	Relationship to you	Months lived with you, if less than 12

Can anyone else claim any of the people listed above? YES_____ NO_____ (elaborate on back)
(ex. They provided >50% of their support and are claiming themselves, or another parent is claiming them)

3. Were you or dependents covered by health insurance on the MARKETPLACE-OBAMACARE(healthcare.gov) **ANY month of 2019**? YES___NO__ (MUST HAVE **1095-A** TO COMPLETE THE TAX RETURN)

4. DID you receive any Medical Loss Ratio Rebates from a Health Insurance Company? Yes__ No__

5. Tuition paid for you and/or your dependents **in 2019 (MUST HAVE FORM 1098-T AND RECEIPTS: SCHOOL PRINT OUT OF 2019 ACCT ACTIVITY IS REQUIRED FOR DUE DILIGENCE)** ______________

6. Student Loan interest paid for you and/or dependents **in 2019 (MUST HAVE Form 1098-E)** ___________

7. Childcare expenses paid in 2019 (daycare, preschool, etc.) & daycare info ____________________________

8. Did you buy sell a home or refinance your mortgage or take out a home equity loan in 2019? YES___ NO___
If yes, we need the settlement sheet(s).
----IF HOME EQUITY LOAN, what were the loan proceeds used for? EXPLAIN______________________________

9. If you moved in 2019: Date moved____________ New address_____________________________________

10. Did you sell any stocks or property in 2019? YES__ NO__ **If YES, we need cost basis information.**

11. At any time in 2019 did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (like BITCOIN)? YES__ NO__ **(MUST BE ANSWERED FOR TAX RETURN!)**

12. If you own a rental property, please complete the **client rental questionnaire** available on website.

13. If over 70 1/2 and have a traditional IRA account, did you receive a Qualified Charitable Distribution from your IRA account in 2019? ___________ If yes, how much_____________________?

14. Please provide the amount and for WHOM the following contributions were made, if any **(this does not apply to contributions made through your employment):**

2019 Roth IRA Contribution____________ ___________________________________
2019 Trad'l IRA Contribution___________ ___________________________________
2019 529 Plan Contribution____________ ___________________________________
2019 ABLE Contribution_______________ ___________________________________

15. Did you purchase and install energy-efficient items in your home in 2018 or 2019? (such as windows, furnace, insulation, exterior doors, hot water htrs, etc**)** **NOT APPLIANCES**. List w/year_________________

--Did you purchase & install energy-efficient **SOLAR, WIND OR GEOTHERMAL** property in 2019? Y__ N __
If so, list____ (Need invoices/ receipts)

16. For PA & Local Return only. List any unreimbursed work related **expenses and amounts paid** (union dues, tools, uniforms, etc.) you paid in 2019 **(State may ask for documentation to verify expenses so be sure to keep receipts or other proof)**

____

17. Do you or your spouse have any financial accounts located outside the U.S.? Y___ N___

18. Have you provided **ALL** of your income from **ALL** sources? Yes_____ NO_____ (if NO, explain below)

19. Did you make any gifts to anyone directly or through a trust exceeding $15,000 per person? Y__ N__

20. Did you purchase any taxable items online or in another state and pay NO sales tax? Y___ N___

-If yes (or not sure), you MUST select one of the following as to how to determine your **use tax** obligation:

_______ I/we purchased taxable goods or services during the year which no sales tax was paid was less than $1,000 and I/we will pay an **estimated use tax** according to the table provided by the PA Dept. of Revenue based upon my income level (ex. <$15K income=$6 & $50-75K income=$23)

_______ I/we purchased taxable goods or services during the year for which the seller did not charge or collect sales tax from me/us. The amount of those sales and/or services to me totaled $__________ and $_________ for my spouse this year

21. For 2020, do you expect a significant increase or decrease in income, deductions or withholding? Y__ N__

22. If you will be receiving a REFUND and would like it directly deposited into your checking account you MUST drop off a voided check BEFORE we can complete your tax return. We need a new voided check each year to verify the bank information.

Please check if you are interested in any of the following: (feel free to contact us after tax season as well)

- ___ Establishing an IRA and/or personal retirement plan
- ___ Budgeting and cash flow planning
- ___ Evaluate current life insurance, disability insurance and retirement program for adequacy
- ___ Project future tax liabilities and find ways to defer or reduce future taxes (income tax planning)
- ___ Obtain an independent professional review of current investments

Additional Comments/Questions:

______________________________x____

Taxpayer Name #1 (*print)* **Signature** **Date**

Driver'sLicense(or State ID) #___________________ Issued ______________Expires_____________

______________________________x____

Taxpayer Name #2 (*print)* **Signature** **Date**
(if joint return)
Driver'sLicense(or State ID) #___________________ Issued ______________Expires_____________