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**Individual Questionnaire for 2016**

Date: \_\_\_\_\_

CLIENT NAME: \_\_\_\_\_

CANNED GOODS DONATION QTY: \_\_\_\_\_

**Please circle "Y" for Yes or "N" for No**

**Personal Information**

- Y N Did your marital status change during the year? If yes, explain: \_\_\_\_\_
- Y N Did your residence change during the year?
- Y N Can you be claimed as a dependent by another taxpayer?
- Y N Are you a Retired Public Safety Officer? If yes, need health insurance paid for the year: \_\_\_\_\_
- Y N Are you retired from the military? (MD Deduction)
- Y N Are you (your spouse) a U.S. Citizen? If No, Resident Alien or Non-Resident Alien

**Dependent Information**

- Y N Were there any changes in dependents from the prior year? If yes, explain: \_\_\_\_\_
- Y N Did you provide over half the support for another person not claimed as a dependent?
- Y N Did you pay child care for a dependent (babysitting, daycare)?  
If yes, please list provider name, address, phone #, social security number/EIN and amount paid.

**Purchases, Sales and Debt Information**

- Y N Did you start or dispose of a business during the year? (bring paperwork)
- Y N Did you acquire a new or additional interest in an LLC, partnership or corporation? (bring paperwork)
- Y N Did you sell, exchange, or purchase any real estate during the year? (bring closing statement)
- Y N Did you dispose of any stock during the year? (bring original cost and sale price with dates)
- Y N Did you take out a home equity loan or line of credit this year? If yes, what was the money used for?
- Y N Did you refinance any property? (bring closing statement) Length of loan years? \_\_\_\_\_
- Y N Did you receive the \$7,500 first time home buyers credit in 2008 (must start repayment on 2010 taxes for the next 15 years)?
- Y N Did you file Bankruptcy in 2016? Chapter 7 (Full) or Chapter 13 (Repayment Plan)
- Y N Did you receive debt forgiveness in 2016? Provide 1099-A or 1099-C

**Income Information**

- Y N Did you have any foreign income or pay any foreign taxes or have any foreign accounts?
- Y N Did you receive any lump-sum payment from a pension or profit sharing plan? Attach 1099-R
- Y N Did you make any rollovers or withdrawals from any retirement account? Attach 1099-R
- Y N Did you receive any unemployment income? Attach 1099-G
- Y N Did you cash in any U.S. Savings bonds?
- Y N Do you have any gambling winnings? Provide W2-G
- Y N Did you receive a damage award for personal injury, sickness or discrimination?
- Y N Did you receive or pay alimony (not child support)? If yes, amount \_\_\_\_\_
- Y N Did you receive executor fees or jury duty fees? If yes, amount \$ \_\_\_\_\_
- Y N Did you receive Social Security benefits? Provide 1099-SA

**(TURN OVER)**

**TAX YEAR 2016**

## Deduction Information

- Y N Are you a teacher or school administrator who provided school supplies in your job?
- Y N Did you have educational expenses for you or your dependents? Attach 1098-T and receipts.
- Y N Did you or your dependent receive employer-provided educational assistance or educational benefits?
- Y N Did you pay any student loan interest this year? Attach 1098-E
- Y N Did you have any job-seeking expenses or were required to move for your job?
- Y N Did you have any unreimbursed employee business expenses?
- Y N Did you use your car on the job, for other than commuting to first job (2nd job miles count for deduction)?
- Y N Do you have a home office? (Fill out Sole Proprietor Questionnaire)
- Y N Did you incur an unreimbursed casualty or theft loss greater than 10% of your income?
- Y N Did you pay sales tax on a car, boat, motor home, manufactured home, truck, motorcycle or plane purchased for personal use (new or used)? If yes, amount: \$\_\_\_\_\_
- Y N Do you own your personal residence where you live? (need property tax amount paid in 2016)**
- Y N Do you have a mortgage or home equity loan? Provide 1098
- Y N Review your paystub: Did you pay union dues or charitable contributions? If so, how much \_\_\_\_\_.
- Y N Did you make any charitable contributions? Need receipts.
- Y N Did you make any non-cash donations? If yes, need donation receipt, list of items and a picture of items.

## Health Insurance Information

- Y N Did you read and sign the attached ACA Form? If have, provide 1095-B or 1095-C
- Y N Did you get a credit? If yes - Provide 1095-A as proof?
- Y N Do you think your medical expenses exceed more than 10% of your income?
- Y N Do you have a Health Savings Account(HSA) or a Medical Savings Account (MSA)?  
If yes, attach 1099-SA showing distributions and 5498-SA showing contributions.
- Y N If you worked for yourself, did you pay health insurance premiums for yourself and your family?  
If yes, dollar amount for the year\_\_\_\_\_

## Credit (deduction) Information

- Y N Did you incur any adoption expenses in 2016?
- Y N Did you install geothermal heat pumps or solar/wind energy systems into your personal residence, second or vacation home?
- Y N Do you have a Flex Spending account at work? What does it pay for? \_\_\_\_\_

## Miscellaneous Information

- Y N Are you currently in the military?
- Y N Did you make gifts of more than \$14,000.00 to any individual last year?
- Y N Did you make any Roth or traditional IRA contributions? If yes, circle which one.
- Y N Have you ever made a non-deductible IRA contribution?
- Y N Did you receive correspondence from federal, state or local tax authorities that I should know about or review? If yes explain:\_\_\_\_\_
- Y N Do you want to allocate \$3 to the Presidential Election Campaign Fund?
- Y N Do you operate a self-employed business? If yes, Fill out Sole Proprietor Questionnaire.
- Y N Did you make estimated payments throughout the year? Check all that apply:  
IRS \_\_\_\_\_ STATE \_\_\_\_\_ LOCAL \_\_\_\_\_
- Y N Do you expect significant changes in income, expenses or dependents for the current year? If yes, explain:\_\_\_\_\_
- Y N Do you want to prepare/update your will/power of attorney for health care and financial decisions?
- Y N Would you like your refund to be direct deposit?(same as last year or bring voided check for new account)

## State Information

- Y N Did you contribute to a 529 (college) Plan? If yes, what state plan and amount:\_\_\_\_\_
- Y N PA Residents: Did you make untaxed purchase from out-of-state retailers (Ex: on internet)?  
If yes, bring purchase receipts or amount.
- Y N Did you qualify for the LOSAP (Length of Service Awards Program) credit? Attach Certification and miles

## Personal Questions

- Y N Would you like to be entered for a chance to win a ticket to a wine tasting in Emmitsburg in September?
- Y N Would you like to be entered for a chance to win a ticket to a 50s-60s dance in Emmitsburg in November?