



TAXES MADE SIMPLE, INC.

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Date dropped off: _____

Client Name: _____

Tax Year: 2019

- ** Do you want your return expedited? **Fee of \$45** is added to tax preparation. Yes / No **Initial:** _____
- ** For this year's tax return, would you like a **copy on a CD (PDF)(Cost of \$10)**? Yes / No **Initial:** _____
- ** Do you need to have the Tax Preparation Fee deducted from your Federal Refund? If yes, the bank processing fees from the Bank \$39.95+ Intuit \$10 =(\$49.95) added to the tax preparation. Yes / No **Initial:** _____

Personal Information

Yes/Unsure/No

- 1- Did your **Marital Status** change during the year? Single/Married/Divorced/Widowed/Separated
- 2- Did your **Residence** change during the year? If so, when move? _____
- 3- Can you be claimed as a dependent by another taxpayer? (ie. Can parents claim you?).....
- 4- Are you or your spouse **disabled and/or blind**?.....
- 5- Do you want to allocate \$3 of your tax to the Presidential Election Campaign Fund?.....
- 6 -Are you or your spouse in the military? Active Duty/Reserves/Guard/Retired

Dependent Information

- 7- Were there any **changes in dependents** from the prior year? (New child/ parent).....
- 8- Do you have any children under age 18 with Interest, Dividends, Capital Gains?
- 9- If you alternate your dependent(s), who do you claim this tax year? _____
- 10- Did you maintain a home for someone not claimed as a dependent? (ie. Parent).....
- 11-Did you **contribute to an Ohio 529 College Plan**? If yes, Provide Year End Statement.....

Healthcare Information

- 12-Did you pay **Health Insurance Premiums** directly for yourself/family: \$ _____
- 13-Did you **receive a Healthcare Premium Assistance or "Marketplace" Assistance? Form 1095-A**
- 14-Do you have a **Health Savings Account (HSA)**? If yes, Provide Form 1099-SA.....

Income Information (Investments - Stocks - Foreign Accounts)

- 15-Do you have any **stock investments/brokerage account/investment accounts**?
- If yes, provide year-end tax Forms 1099-INT, 1099-DIV, & 1099-B
- 16-Did you **dispose of any stock** during the year? Provide 1099-B.....
- 17-Do you have a stock option? Was there any exercised this year?
- If yes, bring brokerage tax form 1099s and original cost and date.
- 18-Did you have any **Foreign Income** or pay any Foreign Taxes?.....
- 19-At any time during 2019, did you receive, sell, exchange, or otherwise acquire any financial interest in any **virtual currency (ie. BITCOIN)**?.....
- 20-Do you have any Foreign Bank Accounts, Retirement Accounts, Property?.....
- 21-Did you **cash in any U.S. Savings bonds**? If yes, provide Form 1099-INT from bank.....

Other Income (Retirement - Alimony - Unemployment - Business & Other)

- 22-Did you make any **Rollovers or Withdrawals from any Retirement Account**?.....
- 23-If you **reached Age 70 1/2**, did you withdraw your **Required Minimum Distribution (RMD)**?.....
- 24-Did you receive **Social Security Benefits** such as Retirement, Death, or Disability?.....
- 25-Did you Receive or Pay Alimony (not child support)? If yes, provide activity for year.....
- 26-Did you receive any **Disability or Unemployment Income**? If yes, provide Tax Form.....
- 27-Did you **start or dispose of a business** during the year? **Receive any Form 1099-MISC**?.....
- 28-Did you purchase a new interest in any Partnership or S Corporation?.....
- 29-Did you **sell, exchange, or purchase any real estate/property** during the year?.....
- If yes, provide closing Settlement Statement/HUD Statement/Final Disclosure Statement.
- 30-Did you receive employer-provided educational assistance?.....
- 31-Did you receive a damage award for personal injury or sickness?.....
- 32-Did you have any **Cancellation of Debt** during this last year? If yes, provide **1099-C & 1099-A**...
- 33-Did you have your **home Foreclosed** during the tax year? Or did you receive a Form 1099-A?.....
- 34-Did you receive any **Lottery Winnings**? If yes, provide W-2G form.....

Provide any Lottery losses only in the same year as the winnings are claimed.

Deduction Information

Yes/Unsure/No

35-Are you a **Teacher** who has unreimbursed supplies? If yes, amount: \$ _____

36-Did you pay any **student loan interest** this year? If Yes, Provide Form 1098-E.....

Itemized Deduction Information

37-Did you have **Medical Expenses**? (Co-pays, vision, dental, prescriptions, mileage, etc.).....

38-Do you have documentation for **Charitable Contributions**? (Need Statements, Proof).....

39-Did you have a **Mortgage, Home Equity Loan, Line of Credit, or Refinance** any property this year? If yes, provide Closing Statement and Mortgage Interest Statement.....

Retirement Contributions (Funds put in)

40-Did you start a new retirement or pension plan this year?.....

41-Did you make any **Roth** or **Traditional IRA** contributions? (provide statement).....

42-Have you ever made a non-deductible IRA contribution?.....

43-Could you **contribute/add more into a Roth or Trad IRA for this tax year**?.....

Credit Information

44-Did your **College Student** receive educational benefits? Provide **Form 1098-T** along with a history of payments, books, and supplies paid for during Tax Year 2019.....

45-Did you pay for **child care** (babysitting, day care – provide statement from provider).....
If yes, provide provider name, address and Social Security number/EIN and amount paid per child

46-Have you started any **Adoption** process? If so, what have you spent towards adoption?.....

Miscellaneous Information

47-Did you pay any **quarterly payments/estimates** to IRS, State, or City? List provided?.....

48-Did you receive any **Notices/Correspondence** from federal, state, or local tax authorities?.....

49-Did you make **gifts of more than \$15,000** to any individual last year?.....

50-Did you engage in any bartering transactions with another individual for their services?.....

51-Did you file for **Bankruptcy** or have a discharge from Bankruptcy last year?.....

52-Do you have a household employee (ie. nanny, butler)?.....

53-Would you like to have your **Refund direct deposited**? (confirm account information)(no fee).....

54-If you have a **Balance Due**, can we withdrawal a balance due automatically from a bank account?
Date of Withdrawal? _____ **Initial:** _____ (no fee for withdrawal)

55-Do you **expect significant changes in income, expenses or dependents for 2020 or 2021**?.....

****Use this space provided for any "YES" answers or Questions for Preparer****

Multiple horizontal lines provided for additional notes or questions.