

Name: _____ Phone number: _____

Address (if new or changed): _____

2015

TAX INFORMATION QUESTIONNAIRE

“You” refers to both taxpayer and spouse — enter “?” if unsure about a question.

- Yes No Are either you or your spouse legally blind?
- Yes No Did you pay or receive alimony in 2015?
Paid/Received \$ _____ Recipient's SS# _____
- Yes No Were any children born or adopted in 2015?
- Yes No Were you or any children attending college? (Provide Form(s) 1098-T and other detailed information)
- Yes No Did you pay any student loan payments in 2015? (Provide Form(s) 1098-E)
- Yes No Did you pay for child or dependent care so you could work or go to school? (Please provide Provider name, address, federal id# and amount paid)
- Yes No Did you have health insurance for you, your spouse, and all dependents for the entire year? (Please provide all copies of Form 1095, we cannot process return without this information)
- Yes No Did you purchase or see a primary residence during the year? If yes, provide details and closing statements
- Yes No If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.
- Yes No Did you refinance a mortgage or take a home equity loan? (Provide closing statement)
- Yes No Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?
- Yes No Did you, or will you, contribute any money to an IRA or any other retirement account other than through your employer for 2015?
- Yes No Did you have any contributions and/or distributions to/from an HSA in 2015? (Provide statements) An HSA is a Health Savings Account.
- Yes No Do you have any children who earned more than \$2,000 of investment income?
- Yes No Did you roll over or withdrawal any amounts from a retirement account in 2015?
- Yes No Did you have any uninsured loss to your property in 2015?
- Yes No Did you work from a home office or use your car for business?
- Yes No Did you sell or transfer any stock or sell rental or investment property?
- Yes No Did you receive any income from an installment sale?
- Yes No Do you own a business or an interest in a partnership, corporation, LLC, or other venture? (Provide detailed information – K-1's, income/expenses, etc.)

