

CLIENT QUESTIONNAIRE

NAME _____ DOB _____ SOCIAL _____ OCCUPATION _____

DRIVERS LIC # _____ STATE _____ ISSUE DATE _____ EXPIRE DATE _____

SPOUSE _____ DOB _____ SOCIAL _____ OCCUPATION _____

DRIVERS LIC # _____ STATE _____ ISSUE DATE _____ EXPIRE DATE _____

DEPENDENT _____ DOB _____ SOCIAL _____

DEPENDENT _____ DOB _____ SOCIAL _____

LIST MORE DEPENDENTS ON REVERSE SIDE

IF YOU DON'T RECOGNIZE SOME OF THE TERMS ON THIS SHEET, THEY PROBABLY DON'T APPLY TO YOU. I WOULD BE HAPPY TO ANSWER AN QUESTIONS ABOUT THESE WHEN YOU COME IN.

IF WE DID YOUR RETURN BEFORE, HAS YOUR ADDRESS, E-MAIL OR PHONE CHANGED?

DO YOU PAY MORE THAN HALF THE LIVING EXPENSES OF A PARENT OR ANYONE ELSE?

DID YOU LIVE APART FROM YOUR SPOUSE (SEPARATED OR DIVORCED) DURING THE YEAR?

DID YOU RECEIVE OR PAY ALIMONY?

DO YOU HAVE AN INVESTMENT ACCOUNT? BRING THE TAX DOCUMENT (FORM 1099) WITH YOU.

DID YOU HAVE ANY GAMBLING WINNINGS?

DID YOU HAVE MEDICAL OR DENTAL EXPENSES THAT EXCEEDED 10% OF YOUR INCOME?

IF YOU HAD AN HSA DISTRIBUTION IN 2017, DID YOU USE THE PROCEEDS FOR QUALIFIED MEDICAL EXPENSES?

DO YOU HAVE RENTAL PROPERTY?

DID YOU MAKE AN IRA CONTRIBUTION OR A CONTRIBUTION OTHER THAN THROUGH WORK – OR TO A COLORADO 529 PLAN FOR YOUR CHILDREN'S EDUCATION? WAS IT A REGULAR OR A ROTH IRA?

WERE THERE ANY MONTHS THAT YOU (OR ANYONE LISTED ON YOUR RETURN) DID NOT HAVE HEALTH CARE COVERAGE? YOUR INSURANCE COMPANY SHOULD HAVE GIVEN YOU A FORM 1095 TO PROVE YOUR COVERAGE – PLEASE BRING IT WITH YOU.

DID YOU TAKE THE PREMIUM TAX CREDIT OR MARKETPLACE COVERAGE? PLEASE BRING THE FORMS FOR THIS WITH YOU.

DID YOU BUY OR SELL A HOUSE? (WE WILL NEED THE HUD-1 OR "SETTLEMENT STATEMENT" FROM THE PURCHASE AND THE SALE)

DO YOU NEED TO FILL OUT A FAFSA FORM FOR YOUR CHILD?

DID YOU PURCHASE AN ELECTRIC VEHICLE IN 2017?

IF YOU ARE A TEACHER OR ADMINISTRATOR AT SCHOOL, DID YOU SPEND ANYTHING ON SUPPLIES THAT YOU WERE NOT REIMBURSED FOR?

DID YOU SUFFER ANY PROPERTY LOSSES THAT WERE NOT COMPENSATED BY INSURANCE?

DID YOU INHERIT AN IRA ACCOUNT IN 2017?

DID YOU EMPLOY A DOMESTIC WORKER (MAID, BABYSITTER, NANNY, ETC) AND PAY THEM MORE THAN \$1900?

DID YOU PAY DAYCARE EXPENSES?

DO YOU HAVE A FOREIGN BANK ACCOUNT OR ACCOUNTS THAT AT ANY TIME DURING THE YEAR HAVE A COMBINED TOTAL OF \$10,000 IN THEM?

DID YOU HAVE FOREIGN ASSETS (BANK ACCOUNTS, REAL ESTATE, BUSINESS INTERESTS, ETC) WITH A VALUE OF MORE THAN \$100,000?

DO YOU WISH TO CLAIM ANY LIABILITY FOR SALES TAX IN THE STATE(S) YOU LIVED IN IN 2017? THIS IS TAX DUE THE STATE FOR INTERNET PURCHASES WHICH WERE NOT PAID.

IF YOU HAVE FILES ON A THUMB DRIVE OR AN ELECTRONIC FILE SHARING PLATFORM, WE HAVE A COMPUTER IN OUR OFFICE THAT YOU CAN USE TO PRINT THE DOCUMENTS ON. WE WOULD LIKE YOU TO PRINT OUT ALL YOUR TAX DOCUMENTS SO THAT WE GET THEM ALL AND HAVE A CHANCE TO REVIEW THEM WITH YOU. IT WILL SAVE TIME IF YOU BRING THEM IN PRINTED OUT.

DO YOU WANT US TO SEND AN INVITATION TO OUR INTERNET PORTAL TO UPLOAD AND STORE YOUR TAX DOCUMENTS?

PLEASE BRING IN ALL OF YOUR W-2s, 1099s, 1098s, ETC.

IF YOU THINK YOU WILL RECEIVE A REFUND AND WOULD LIKE IT ELECTRONICALLY DEPOSITED, PLEASE BRING A VOIDED CHECK FROM THE CORRECT ACCOUNT. IF YOU HAD THIS DONE LAST YEAR, IS YOUR BANK AND ACCOUNT NUMBER THE SAME?

PLEASE DO NOT TRANSMIT THIS QUESTIONNAIRE TO US ELECTRONICALLY UNLESS WE DIRECT YOU TO. BRING IT IN WHEN YOU COME FOR YOUR INTERVIEW.

WERE YOU REFERRED TO US BY ONE OF OUR CLIENTS?

IF YOU FOUND US ON THE INTERNET, WHERE DID YOU SEARCH?

THANKS FOR TAKING TIME TO REVIEW THESE QUESTIONS. THIS HELP US TO MORE THOROUGHLY UNCOVER ANY DEDUCTIONS YOU MAY BE ENTITLED TO.

FRANKLIN TAX SERVICE, LLC
720-570-2000