

**FRANKLIN TAX SERVICE
CLIENT QUESTIONNAIRE**

Name		Spouse	
Name		Name	
Date of Birth		Date of Birth	
Social Security #		Social Security #	
Occupation		Occupation	
Driver's License #		Driver's License #	
State		State	
Issue Date		Issue Date	
Expiration Date		Expiration Date	

Dependent(s)			
Name		Name	
Date of Birth		Date of Birth	
Social Security #		Social Security #	
Name		Name	
Date of Birth		Date of Birth	
Social Security #		Social Security #	
Name		Name	
Date of Birth		Date of Birth	
Social Security #		Social Security #	

WERE YOU REFERRED TO US BY ONE OF YOUR CLIENTS?

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

**PLEASE BRING IN ALL OF YOUR W-2s, 1098s, 1099s, ETC.
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 DOCUMENTS ON. WE WOULD LIKE FOR YOU TO PRINT OUT ALL OF YOUR TAX DOCUMENTS SO THAT WE CAN THEM ALL AND HAVE A CHANCE TO REVIEW WITH YOU. IF WILL SAVE TIME IF YOU BRING THEM PRINTED OUT.**

PLEASE DO NOT TRANSMIT THIS QUESTIONNAIRE TO US ELECTRONICALLY UNLESS WE DIRECT YOU TO.

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

**FRANKLIN TAX SERVICE, LLC
720-570-2000
franklintaxservice.com**

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PLEASE ANSWER THE QUESTIONS BELOW.

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 ANY QUESTIONS ABOUT THESE WHEN YOU COME IN.

PLEASE PLACE AN "X" IN THE APPROPRIATE BOX TO THE RIGHT.

		YES	NO	N/A
1	IF WE DID YOUR RETURN BEFORE, HAS YOUR ADDRESS, E-MAIL OF PHONE # CHANGED?			
2	DO YOU PAY MORE THAN HALF THE LIVING EXPENSES OF A PARENT OR ANYONE ELSE?			
3	DID YOU LIVE APART FROM YOUR SPOUSE (SEPARATED OR DIVORCED) DURING THE YEAR?			
4	DID YOU RECEIVE OR PAY ALIMONY? IF SO, DATE DIVORCE FINAL_____			
5	DID YOU HAVE ANY GAMBLING WINNINGS?			
6	DID YOU PURCHASE AN ELECTRIC VEHICLE IN 2019?			
7	DID YOU HAVE MEDICAL OR DENTAL EXPENSES THAT EXCEEDED 7.5% OF YOUR INCOME?			
8	IF YOU HAD A H.S.A. DISTRIBUTION, DID YOU USE THE PROCEEDS FOR QUALIFIED MEDICAL EXPENSES?			
9	DID YOU TAKE THE PREMIUM TAX CREDIT OR MARKETPLACE COVERAGE? PLEASE BRING FORMS WITH YOU.			
10	DO YOU HAVE AN INVESTMENT ACCOUNT? BRING FORM 1099 WITH YOU.			
11	DID YOU INHERIT AN IRA ACCOUNT?			
12	DO YOU HAVE RENTAL PROPERTY?			
13	DID YOU SUFFER ANY PROPERTY LOSSES THAT WERE NOT COMPENSATED BY INSURANCE?			
14	DID YOU PAY DAYCARE EXPENSES? IF YES, WE NEED THE ANNUAL STATEMENT FROM YOUR PROVIDER			
15	DID YOU EMPLOY A DOMESTIC WORKER (MAID, BABYSITTER, NANNY) AND PAY THEM MORE THAN \$1900?			
16	DO YOU NEED TO FILL OUT A FAFSA FORM FOR YOUR CHILD?			
17	DID YOU MAKE AN IRA CONTRIBUTION OTHER THAN THROUGH WORK? WAS IT A REGULAR OR A ROTH IRA? A CONTRIBUTION TO A COLORADO 529 PLAN FOR YOUR CHILDREN'S EDUCATION?			
18	WERE THERE ANY MONTHS THAT YOU (OR ANYONE ELSE LISTED ON RETURN INCLUDING DEPENDENTS) DID NOT HAVE HEALTH CARE COVERAGE? PLEASE BRING YOUR 1095 FORM WITH YOU.			
19	DID YOU BUY OR SELL A HOUSE? PLEASE BRING THE HUD-1 OR SETTLEMENT STATEMENT FROM PURCHASE AND/OR SALE.			
20	IF YOU ARE A TEACHER OR ADMINISTRATOR AT SCHOOL, DID YOU SPEND ANYTHING ON SUPPLIES THAT YOU WERE NOT REIMBURSED FOR?			
21	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?			
22	DID YOU HAVE FOREIGN ASSETS (BANK ACCOUNTS, REAL ESTATE, BUSINESS INTERESTS) WITH A VALUE OF MORE THAN \$100,000?			
23	DO YOU WISH TO CLAIM ANY LIABILITY FOR SALES TAX IN THE STATE(S) YOU LIVED? THIS IS TAX DUE THE STATE FOR INTERNET PURCHASES WHICH WERE NOT PAID.			
24	DO YOU WANT US TO SEND AN INVITATION TO OUR PORTAL TO UPLOAD AND STORE YOUR TAX DOCUMENTS?			
25	IF YOU THINK YOU WILL RECEIVE A REFUND AND WOULD LIKE IT ELECTRONICALLY DEPOSITED, PLEASE BRING A VOIDED CHECK FOR THE CORRECT ACCOUNT. IF YOU HAD THIS DONE LAST YEAR, IS YOUR BANK ACCOUNT NUMBER THE SAME?			
26	AT ANY TIME DURING 2019 DID YOU RECEIVE, SELL, SEND, EXCHANGE, OR OTHERWISE ACQUIRE ANY FINANCIAL INTEREST IN ANY VIRTUAL CURRENCY?			