

**FRANKLIN TAX SERVICE
CLIENT QUESTIONNAIRE**

| <p style="text-align: center;">PLEASE ANSWER THE QUESTIONS BELOW.</p> <p style="text-align: center;">IF YOU DON'T RECOGNIZE SOME OF THE TERMS ON THIS SHEET, THEY PROBABLY DON'T APPLY TO YOU.</p> <p style="text-align: center;">I WOULD BE HAPPY TO ANSWER ANY QUESTIONS ABOUT THESE WHEN WE TALK.</p> <p style="text-align: center;">PLEASE PLACE AN "X" IN THE APPROPRIATE BOX TO THE RIGHT.</p> | | | | 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? | | | | | |
| 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? SENDFORM 1099 ALSO CALLED THE CONSOLIDATED TAX STATEMENT | | | | | |
| 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 \$2200? | | | | | |
| 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 CHIDREN'S EDUCATION? | | | | | |
| 18 | PLEASE LIST ANY STIMULUS PAYMENTS YOU RECEIVED IN 2020 ONLY ON THIS PAGE OR A SEPARATE SHEET. | | | | | |
| 19 | DID YOU BUY OR SELL A HOUSE? PLEASE SEND THE HUD-1 OR SETTLEMENT STATEMENT FROM PURCHASE AND/OR SALE. | | | | | |
| 20 | IF YOU ARE A TEACHER OR ADMINISTRATOR AT SCHOOL, DIDYOU 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 | RESERVED FOR LATER USE | | | | | |
| 25 | IF YOU THINK YOU WILL RECEIVE A REFUND AND WOULD LIKE IT ELECTRONICALLY DEPOSITED, PLEASE SEND 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 FURING 2019 DID YOU RECEIVE, SELL, SEND, EXCHANGE, OR OTHERWISE ACQUIRE ANY FINANCIAL INTERST IN ANY VIRTUAL CURRENCY? | | | | | |

**FRANKLIN TAX SERVICE
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| 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 OUR CLIENTS?

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

WE ARE NOT MEETING WITH CLIENTS THIS YEAR DUE TO THE VIRUS. HOWEVER, OUR OFFICE IS OPEN AND YOU CAN DROP DOCUMENTS OFF AND PICK THEM UP IF THAT IS MORE CONVENIENT.

PLEASE USE THE PDF FORMAT WHEN SENDING SCANNED DOCUMENTS. CELLPHONE PHOTOS ARE USUALLY VERY POOR QUALITY ON THE RECEIVING END (JPEG FILES). IF YOU MUST USE YOUR CELL PHONE, DOWNLOAD AN APP CALLED GENIUS SCAN. IT SCANS YOUR DOCUMENTS TO YOUR PHONE IN PDF FORMAT AND IS MUCH MORE READABLE. THE BASIC VERSION IS FREE. WE PREFER SCANNED PDFs BUT MANY DO NOT HAVE ACCESS TO SCANNERS.

PLEASE SEND US A COPY OF THE FRONT OF YOUR DRIVER'S LICENSE FOR THE PRIMARY (AND SECONDARY IF A JOINT RETURN) TAXPAYER IF YOU ARE A NEW CLIENT.

IF YOU ACQUIRED A NEW DRIVER'S LICENSE SINCE LAST YEAR, PLEASE SEND US THE NEW ISSUE AND EXPIRATION DATES.

WE ARE USING A NEW SECURE DOCUMENT TRANSFER – EMAIL PLATFORM CALLED VERIFYLE. WE CAN SEND YOU AN INTRO EMAIL. WE STRONGLY RECOMMEND THAT YOU ONLY TRANSFER DOCUMENTS VIA THIS ENCRYPTED SYSTEM TO AVOID IDENTITY THEFT.

IF YOU ARE A NEW CLIENT, WE WILL NEED A COPY OF THE LAST TAX RETURN YOU FILED.

THANKS FOR CHOOSING FRANKLIN TAX SERVICE!