

2017

1040

US

Client Information (continued)

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Please add, change or delete information for 2017.

CLIENT INFORMATION

Taxpayer Contact Information	Home phone.....		Daytime Phone 1 = Work 2 = Home 3 = Mobile
	Work phone.....		
	Work extension.....		
	Daytime phone (table).....		
	Mobile phone.....		
	Fax number.....		
	E-mail address.....		
Spouse Contact Information	Home phone.....		
	Work phone.....		
	Work extension.....		
	Daytime phone (table).....		
	Mobile phone.....		
	Fax number.....		
	E-mail address.....		
Taxpayer Authentication	Driver's license no.....		
	Driver's license state.....		
	Expiration date (m/d/y).....		
	Issue date (m/d/y).....		
	Theft protection PIN.....		
Spouse Authentication	Driver's license no.....		
	Driver's license state.....		
	Expiration date (m/d/y).....		
	Issue date (m/d/y).....		
	Theft protection PIN.....		

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If any of the following items pertain to you or your spouse for 2017, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2017? |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2017? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2017, with interest and dividend income in excess of \$1,050, or total investment income in excess of \$2,100? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any child care expenses for children under age 13 so that you could work or look for work? |

HEALTH CARE COVERAGE

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you and your dependents have healthcare coverage for the full-year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any of the following IRS Documents? Form 1095-A (Health Insurance Marketplace Statement), 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage) If so, please attach. |
| <input type="checkbox"/> | <input type="checkbox"/> | If you or your dependents did not have health care coverage during the year, do you fall into one of the following exemption categories: Indian tribe membership, health sharing ministry membership, religious sect membership, incarceration, exempt non-citizen or economic hardship? If you received an exemption certificate, please attach. |

INCOME

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |

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Yes	No	
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<input type="checkbox"/>	<input type="checkbox"/>	Did you have any foreign income or pay any foreign taxes?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any bartering income? If so, please indicate the amount received.
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PURCHASES, SALES AND DEBT

<input type="checkbox"/>	<input type="checkbox"/>	Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase a new vehicle? If so, please attach the purchase contract.
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<input type="checkbox"/>	<input type="checkbox"/>	Did you buy or sell any stocks, bonds or other investment property in 2017?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, please provide the closing statement.
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<input type="checkbox"/>	<input type="checkbox"/>	Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? If so, please provide the receipt and manufacturers certification.
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<input type="checkbox"/>	<input type="checkbox"/>	Did you have any debts cancelled or forgiven?
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<input type="checkbox"/>	<input type="checkbox"/>	Does anyone owe you money which has become uncollectible?
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RETIREMENT PLANS

<input type="checkbox"/>	<input type="checkbox"/>	Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? If so, please provide Form 1099-R.
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<input type="checkbox"/>	<input type="checkbox"/>	Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? If so, please provide Form 5498 or a year-end statement if Form 5498 is not available.
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<input type="checkbox"/>	<input type="checkbox"/>	Did you transfer or rollover any amount from one retirement plan to another retirement plan? If so, please provide documentation.
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<input type="checkbox"/>	<input type="checkbox"/>	Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2017? If so, please provide Form 1099-R.
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<input type="checkbox"/>	<input type="checkbox"/>	Did you contribute to, or receive a distribution from, a health savings account (HSA)? If so, please attach Form 1099-SA (distributions) and Form 5498-SA (contributions).
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<input type="checkbox"/>	<input type="checkbox"/>	If you received a distribution from your health savings account (HSA), was it used for qualified medical expenses?
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EDUCATION

Yes No

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? If so, please provide Form 1099-Q.

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If so, please attach Form 1098-T.

If you incurred college tuition expenses, did the student receive any scholarships or grants? If so, please indicate the amount received.

If you incurred college tuition expenses, did the student meet all of the following four requirements? (1) the student was enrolled at least half-time for at least one academic period during the year, (2) the student has not completed the first 4 years of post-secondary education before 2017, (3) the student was enrolled in a program leading towards a degree, certificate or credential, and (4) the student was not convicted of a felony before the end of 2017.

Did you pay any student loan interest? If so, please attach Form 1098-E.

Did you incur any educator (i.e. teacher) expenses and work more than 900 hours in K-12 education for 2017? If so, please indicate the amount paid for unreimbursed out-of-pocket school supplies.

Did you contribute to a 529 college savings plan during the year? If so, please indicate the total amount contributed.

ITEMIZED DEDUCTIONS

Did you incur a loss because of damaged or stolen property?

Did you use your car on the job (other than to and from work)?

If you used your car on the job, did you receive reimbursement from your employer for your vehicle expenses?

If you used your car on the job, and did not receive reimbursement, do you have written documentation (i.e. mileage log)?

If you made a charitable contribution that was more than \$250, do you have both a bank record and a receipt from the organization stating that no goods or services were received?

If you incurred more than \$250 of charitable volunteer expenses, do you have both a bank record and a receipt from the organization stating that no goods or services were received?

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Yes No

 If you donated noncash items during the year (i.e. clothing and household goods), were the items in good or very good condition at the time of the donation?

 Did you make charitable contributions that could qualify for the Arizona tax credits? If so, please attach receipts.

ESTIMATED TAXES

 Did you make any estimated tax payments? If so, please provide dates and amounts paid.

 If you have an overpayment of 2017 taxes, do you want the excess applied to your 2018 estimated tax (instead of being refunded)?

MISCELLANEOUS

 If you get a tax refund, would you like to direct deposit the refund into your bank account?

 Do you want to allocate \$3 to the Presidential Election Campaign Fund?

 Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

 Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

 Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

 Did you own any foreign assets (i.e. real estate, business, estate, financial instruments, retirement plans, contracts)?

 Was your home rented out or used for business?

 Did you incur moving expenses due to a change of employment?

 Did you engage the services of any household employees (i.e. nannies, caretakers, housekeepers)? If the amount paid exceeds \$2,000, please indicate the amount paid.

 Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

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Miscellaneous Questions

Yes

No

Did you or your spouse make any gifts to an individual that total more than \$14,000, or any gifts to a trust?

Did your bank account information change within the last twelve months? If so, and you would like to direct deposit your tax refund, please provide a voided check from the new account.

Paperless option #1: Do you want your client copy of your income tax return emailed to you in PDF format?

Paperless option #2: Do you want your client copy of your income tax return on a CD in PDF format?

Would you like a paper copy of your income tax return?

Are you currently on our email list? If not, please write your email address here.