

West Chester Tax Accountants

PROFESSIONAL SERVICES PROVIDED AT AFFORDABLE RATES!

2017 Tax Questionnaire

<u>Name and Address:</u>	<u>Social Security Number:</u>	<u>Occupation:</u>
Taxpayer:		
Address:		
Email Address:	Phone Number:	DOB:
<u>Name and Address:</u>	<u>Social Security Number:</u>	<u>Occupation:</u>
Spouse:		
Address:		
Email Address:	Phone Number:	DOB:

<u>Dependent's Name and DOB:</u>	<u>Social Security Number:</u>	<u>Income: Y/N</u>

Personal Information

Can you or your spouse be claimed as a dependent by another tax payer?

Yes	No

Have you or your spouse been a victim of identity theft and have been contact by the IRS?

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If Yes, please provide the 6-digit protection pin that was issued by the IRS.

Taxpayer:
Spouse:

Did you or your spouse pay any student loan interest?

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Did you or your spouse have any withdraws from a retirement account like a 401K or IRA?

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Did you or your spouse withdraw money from a Qualified Education Program (Section 529 Plan)?

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If yes, please provide Forms 1099-Q.

Did you, your spouse or your dependents incur any post-secondary education expenses, such as tuition?

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Health Care Info.

Did you have healthcare coverage for you, your spouse, and any dependents for the entire year?

If yes, please provide all forms 1095-A, 1095-B, & 1095-C.

Yes	No

Dependents:

Did you or your spouse pay for child care while you or your spouse worked or looked for work?

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Do you have any children with unearned income of \$1,050 or more?

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Do you have any children with earned income or unearned income?

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Deductions and Credits

Did you or your spouse make any charitable contributions during 2017?

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Did you or your spouse incur any casualty or theft losses?

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Did you or your spouse make any large purchases, such as a automobile?

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Did you or your spouse purchase or sell your personal residence during 2017?

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Other Misc. Items

Did you or your spouse make any gift in excess of \$14,000 to any individual?

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Did you or your spouse perform any work outside of the U.S. or pay foreign income taxes?

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Did you or your spouse own any foreign financial assets?

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Did you or your spouse make any Federal or State estimated tax payments during 2017?

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Did you or your spouse contribute to an Education Saving account, such as a 529 plan?

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Do you wish to have your Federal and State Tax Refund direct deposited to your bank account?

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If so, please provide the following:

Routing Number:
Account Number:
Checking/Savings: