

## Tax Filing Questionnaire

- Who is filing?
  - Name \_\_\_\_\_
  - Date of Birth \_\_\_\_\_
  - SSN \_\_\_\_\_
- Spouse?
  - Name \_\_\_\_\_
  - Date of Birth \_\_\_\_\_
  - SSN \_\_\_\_\_
- What tax years do you need filed?
  - 2019 \_\_\_\_\_
  - 2018 \_\_\_\_\_
  - 2017 \_\_\_\_\_
  - 2016 \_\_\_\_\_
  - 2015 \_\_\_\_\_
  - Prior \_\_\_\_\_
- Has your marital status changed?
  - Date \_\_\_\_\_
  - Change \_\_\_\_\_
- Did you have any children
  - Date of Birth \_\_\_\_\_
  - Name \_\_\_\_\_
  - SSN \_\_\_\_\_
  - Date of Birth \_\_\_\_\_
  - Name \_\_\_\_\_
  - SSN \_\_\_\_\_
  - Date of Birth \_\_\_\_\_
  - Name \_\_\_\_\_
  - SSN \_\_\_\_\_
- Has your address changed?
  - Date \_\_\_\_\_
  - Address \_\_\_\_\_
  - Closing statement \_\_\_\_\_
  - Did you participate in the first time homebuyers 2008? \_\_\_\_\_
- Did you purchase a new vehicle/boat/trailer?
  - Date \_\_\_\_\_
  - Bill of sale \_\_\_\_\_
- Do you have medical insurance?
  - Furnished by employer \_\_\_\_\_
  - Purchased through market place \_\_\_\_\_
    - Form 1095-a \_\_\_\_\_
    - Insurance card \_\_\_\_\_

- Did you work for someone/ a company?
  - W-2\_\_\_\_\_
  - 1099\_\_\_\_\_
- Did your spouse work for someone/ a company?
  - W-2\_\_\_\_\_
  - 1099\_\_\_\_\_
- Did you receive un-employment?
  - 1099G\_\_\_\_\_
- Did your spouse receive un-employment?
  - 1099G\_\_\_\_\_
- Did you receive Social Security benefits?
  - 1099SA\_\_\_\_\_
- Did your spouse receive Social Security benefits?
  - 1099SA\_\_\_\_\_
- Did you receive any retirement income?
  - 1099R\_\_\_\_\_
- Did your spouse receive any retirement income?
  - 1099R\_\_\_\_\_
- Did you start a business?
  - Financial information\_\_\_\_\_
  - Do you want us to compile your receipts into financial data?\_\_\_\_\_
- Do you have a small business?
  - Financial information\_\_\_\_\_
  - Do you want us to compile your receipts into financial data?\_\_\_\_\_
- Do you own a farm?
  - Financial information\_\_\_\_\_
  - Do you want us to compile your receipts into financial date?
- Do you have any a rental income?
  - Financial information\_\_\_\_\_
  - Do you want us to compile your receipts into financial date?
- Do you have a mortgage?
  - 1098\_\_\_\_\_
  - Property tax statement\_\_\_\_\_
- Do you have any medical expenses?
  - Doctors\_\_\_\_\_
  - Hospital\_\_\_\_\_
  - Medication\_\_\_\_\_
  - Premium\_\_\_\_\_
  - Mileage\_\_\_\_\_
- Do you have any charitable donations?
  - Contribution statement\_\_\_\_\_
  - Clothing or goods\_\_\_\_\_

- Did you contribute to a retirement account?
  - 401k\_\_\_\_\_
  - IRA\_\_\_\_\_
  - Roth IRA\_\_\_\_\_
- Did you repay any student loans?
  - 1098E\_\_\_\_\_
  - December/January statement\_\_\_\_\_
- Are you or a dependent currently in college?
  - 1098T\_\_\_\_\_
  - Books\_\_\_\_\_
  - Computer\_\_\_\_\_
  - Other expenses\_\_\_\_\_
- Did you use a college fund to pay for school?
  - Cloverdale 1099Q\_\_\_\_\_
  - 529 plan 1099Q\_\_\_\_\_
  - EE Savings bonds 1099int\_\_\_\_\_
- Did you pay for childcare?
  - Name\_\_\_\_\_
  - SSN\_\_\_\_\_
  - Amount\_\_\_\_\_
  - Dependent Name\_\_\_\_\_
- What questions do you have?
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
- How did you hear about Ray County Accounting & Tax?
  - Facebook\_\_\_\_\_
  - Website\_\_\_\_\_
  - Referral\_\_\_\_\_
  - Other\_\_\_\_\_
- Do you want to receive your refund direct deposit?
  - Bank Account Number\_\_\_\_\_
  - Routing Number\_\_\_\_\_

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