

2018 EZ Questionnaire

Advisor Tax Services

NOTE: All clients must fill out the 2018 Health Insurance questionnaire

T = Taxpayer S = Spouse

Prior clients need only enter information that changed since last year

Name (T) _____ Signature _____ Date ___/___/___

Name (S) _____ Signature _____ Date ___/___/___

Birthdate: (T) ___/___/___ (S) ___/___/___ Occupation: (T) _____ (S) _____

Phones: home _____ work (T) _____ work (S) _____

Use texting on cell? Y N cell (T) _____ cell (S) _____

Email: (T) _____ @ _____ (S) _____ @ _____

Mailing address: _____

Physical address (if different than mailing): _____

Please check Y or N for all items below

- Y N own real estate
- Y N have children or other dependents; **if yes, please fill out our dependent questionnaire**
- Y N received income reported on forms **other than** W2, 1099-INT, 1099-G or 1099-SSA
- Y N received self-employment or independent contractor income (may be on 1099-MISC)
- Y N received income in **cash** for any services provided or items sold
- Y N received income from alimony, jury duty, lawsuits, awards, prizes, scholarships or grants
- Y N received income from rental property or investments such as stocks, bonds or mutual funds
- Y N received a distribution from an IRA, 401k or other retirement plan reported on form 1099-R
- Y N paid college tuition (not loan payments) during the year, either directly or with student loans

If you answered Yes to any of the above you may need to fill out our 2018 Standard Questionnaire

- Y N received cash tips that were not reported to employer; if yes, how much \$ _____
- Y N received correspondence in the past year from the IRS or state (other than refunds)
- Y N bought items out of state or over the internet for which you paid no sales tax
- Y N wish to donate to the Nongame Wildlife, Veteran's, Green Up VT or Children's Trust Fund
- Y N have contributed or plan to contribute to a traditional or Roth IRA before 4/15/2019
- Y N contributed to or received a distribution from a Health Savings Account (HSA)
- Y N contributed to retirement plan or flexible spending account (FSA) thru payroll deduction
- Y N paid interest on student loans (reported on form 1098-E)
- Y N made estimated tax payments (federal or state – other than withholding from wages)
- Y N participated in employee stock purchase plan or other stock option plan
- Y N received an inheritance or gift of money or other assets
- Y N received a loan from a relative or friend that you have to pay back
- Y N declared bankruptcy or insolvency in the past

How many of the following tax forms have you received for 2018 ?

- _____ W2 (wages) _____ 1099-G (unemployment compensation and/or state tax refund)
- _____ 1099-INT (interest) _____ 1099-DIV or 1099-B (dividends and/or proceeds of security sales)
- _____ 1099-R (retirement) _____ SSA-1099 (social security or SSDI)
- _____ 1098-E (student loan interest) _____ 1095-A, B or C (health insurance)
- Y N have you received any other types of tax forms? If yes, list here _____
- Y N do you have any tax questions? _____