

- 10. Have you paid any daycare expenses in 2018 for a child under age 13 or a disabled spouse or other disabled dependent? Yes or No
- 11. Have you, your spouse or your dependents taken any college or tech school courses in 2018? (You must provide the 1098-T from the educational institution) Yes or No
- 12. Have you paid interest on any student loans in 2018? Yes or No
- 13. Have you bought, sold, or had your Home foreclosed on in 2018? Yes or No
- 14. Have you had any Cancellation of Debt in 2018? (Such as credit cards, auto loans, forgiveness of debt, repossession, etc) Yes or No
- 15. Have you made any SOLAR or GEOTHERMAL improvements to your personal residence? Yes or No
- 16. Did you make any out of state purchases (by phone, internet, mail order, etc) that the seller did not collect state sales or use tax on? (ex: Amazon, Ebay, etc.) Yes or No
- 17. Did you sell stock, timber, real estate, or any other assets in 2018? Yes or No
- 18. Did you receive Social Security benefits in 2018? (if yes please provide your 1099-SSA form) Yes or No
- 19. Did you receive any lottery winnings, jury duty pay or alimony in 2018? Yes or No
- 20. Did you have a casualty loss due to Hurricane damage from 2015 to present? Yes or No
- 21. For the year 2018 did you have health insurance for you and your family? (Thru either Individual Policy, Employer, Government Agency (Medicaid or State) or Health Care Market Place. Yes or No

Please note in the section below any other items you would like to discuss with your tax preparer:

NOTES:

Our fees are based on the size, complication and forms on your tax return. These fees cannot be accurately determined until the completion of the return. However, if price is a concern, please ask the preparer for a cost estimate prior to the start of your return. The estimate will be within 10% of the final fee. Once the return is started you will be responsible for the fee.

Please sign and date:

Taxpayer: _____ Date: _____

Spouse: _____ Date: _____