



- 10. Have you paid any daycare expenses in 2019 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 2019? (You must provide the 1098-T from the educational institution) Yes or No
- 12. Have you paid interest on any student loans in 2019? Yes or No
- 13. Have you bought, sold, or had your Home foreclosed on in 2019? Yes or No
- 14. Have you had any Cancellation of Debt in 2019? (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 2019? Yes or No
- 18. Did you receive Social Security benefits in 2019? (if yes please provide your 1099-SSA form) Yes or No
- 19. Did you receive any lottery winnings, jury duty pay or alimony in 2019? Yes or No
- 20. Did you have any Virtual Currency (Bitcoin, Litecoin, Ethereum, etc.) or any Foreign Bank Accounts or Trusts? Yes or No
- 21. For the year 2019 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 (1095-A required)). Yes or No

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

NOTES:

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**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: \_\_\_\_\_