

CLIENT NAME \_\_\_\_\_

(Last)

(First)

If any of the following items pertain to you (or your spouse or registered domestic partner) for tax year 2017, please check the appropriate box and provide additional information as necessary.

**Yes No PERSONAL INFORMATION**

Did your marital status change during the year?

Did your address change during the year?

Could you be claimed as a dependent on another person's tax return for 2017?

**Yes No DEPENDENTS**

Were there any changes in your dependents?

Were any of your unmarried children who might be claimed as dependents, 19 years of age or older at the end of 2017?

Did you have any children under age 19 or full-time students under age 24 at the end of 2017, with interest and dividend income in excess of \$1,050, or total investment income in excess of \$2,100?

Did you support anyone other than your own children?

**Yes No HEALTH INSURANCE**

Did you have qualifying healthcare coverage(employer group plan or government sponsored coverage) for every month of 2017 for you, your spouse and all members of your family that are claimed on your tax return?

Did you acquire health coverage through the Marketplace under the Affordable Care Act? If yes, please provide Form 1095-A (Health Insurance Marketplace Statement).

Did you receive any Forms 1095-B (Health Coverage) or Forms 1095-C (Employer Provided Health Insurance Offer and Coverage). If Yes, please provide these forms.

**Yes No INCOME**

Did you receive unreported tip income of \$20 or more in any month?

Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?

Did you receive any disability income?

Did you have any foreign income or pay any foreign taxes?

Did you have any other income that was not disclosed on forms W-2 or 1099?

Did you receive any unemployment compensation?

**Yes No PURCHASES, SALES AND DEBT**

Did you purchase rental or royalty property in 2017?

Did you buy or sell any stocks, bonds or other investment property in 2017?

Did you buy or sell any cryptocurrency in 2017?

Did you purchase, sell, or refinance your principal or second home, or did you take a home equity loan?



**Yes No ESTIMATED TAXES**

Did you apply an overpayment of 2016 taxes to your 2017 estimated tax (instead of being refunded)?  
If you have an overpayment of 2017 taxes, do you want the excess applied to your 2018 estimated taxes instead of being refunded?  
Do you expect your 2018 income to be different than in 2017?

**Yes No MISCELLANEOUS**

Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?  
Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?  
Are you aware of any unfiled tax returns from prior years?  
Do you currently owe the IRS or state for prior year balances?  
Are you in default on any student loans that may impact the processing of your IRS or state refund?  
Do you want to use direct deposit for any Federal and/or State refund?  
Do you want to use electronic funds withdrawal for any Federal and/or State balance due?  
Do you want to allocate \$3 to the Presidential Election Campaign Fund?  
May the IRS discuss your tax return with your preparer?  
Did you (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) this year? Or, did you receive an HSA distribution or acquire an interest in an HSA due to the death of the account beneficiary?  
Was your home rented out or used for business?  
Did you acquire an interest in any financial accounts due to the death of an account holder?  
Did you receive payments under a long-term care (LTC) insurance contract or receive any accelerated death benefits from a life insurance policy?  
Did you incur moving expenses due to a change of employment?  
Did you engage the services of any household employees?  
Did you make any gifts to an individual that total more than \$14,000, or any gifts to a trust?  
Did you purchase general merchandise for use in Illinois on which you did not pay the required amount of Illinois Use Tax?

**ADDITIONAL QUESTIONS OR COMMENTS**

\_\_\_\_\_  
\_\_\_\_\_

**REQUIRED SIGNATURES**

Taxpayer(s) \_\_\_\_\_ Date \_\_\_\_\_

Taxpayer(s) \_\_\_\_\_ Date \_\_\_\_\_