

Client Questionnaire for 2016 Tax Information

Household and Dependent Information:

YES NO

In 2016 how many people resided at your address? _____ How many had income in 2016? _____		
How many of your children under age 19 lived with you more than six months ? _____		
Since your last tax return, are there additions or subtractions of dependents or spouse?		
Did you pay a daycare provider?		
Do you have a "flex-spending account" at work to pay for child care?		
Did you pay any student loan interest for yourself or dependents?		
Did you have college tuition/expenses for you or your dependents? 1098T required!		
Has anyone in your household attending college been convicted of a felony?		

Income Information:

Did you have foreign bank accounts, foreign income, foreign assets, foreign taxes or online gaming?		
Did you make any rollovers/withdrawals from any retirement account?		
Did you have any interest or dividend income?		
Did you dispose of or sell stock during the year?		
Did you receive any unemployment income, disability or qualified HSA distributions?		
Did you cash any U.S. Savings Bonds?		
Did you visit Luckytown this year and win big (gambling income)?		
Did you receive or pay alimony (not child support)?		
Have you filed bankruptcy, had a foreclosure, or cancellation of debt in 2016?		
Do you have long-term care (nursing home) insurance?		
Do you have unreported tip income?		

Itemized Deductions and Miscellaneous:

Did you pay mortgage(s) interest on your residence (form 1098)?		
Did you pay real estate tax and/or personal property tax in 2016?		
Did you have any unreimbursed employee expenses including mileage?		
Did medical expenses exceed 10% of your income (or 7.5% if over age 65)?		
Do you have a receipt(s) from a qualified charity acknowledging your contributions - cash or goods?		
Are you a teacher who has unreimbursed supplies with receipts? Total Amount = \$ _____		
Did you make any quarterly or annual estimated tax payments?		
Do you wish to contribute \$3 to the presidential election campaign fund or to any state trust funds?		
Did you make any energy-efficient improvements in 2016?		

Business, Rental and Farm: (if marking yes to any question in this section, complete page 6)

Did you start/dispose of a business; acquire new or additional interest in a partnership or S corporation this year?		
Do you have a self employed business, rental property, partnership, LLC, or corporation?		

REFUND and PAYMENT OPTIONS:

I would like my 2016 tax refund(s) direct deposited into my account; I am providing a voided check.		
I will pay fees for having my taxes prepared to J & J Accounting with cash, check or credit/debit card.		

Client Name