

CLIENT QUESTIONNAIRE for TAX YEAR 2016

NAME _____ **PHONE** _____ **DATE** _____
EMAIL _____

Please indicate **YES** or **NO** to each of the following questions:

Can you be claimed as a dependant by another taxpayer? _____

Were there any Births, Deaths, Divorces, Marriages or Adoptions in 2016? _____

Did you provide a home for or help support another person? _____

Do you have any disabled children under the age of 21? _____

Do you have any *Consumer Use Tax* to report for 2016? (Internet purchases) _____

Did you make estimated tax payments? _____

Did you file Bankruptcy/Canceled Debt or modify a loan? _____

Did you withdraw from a mutual fund or sell a stock? _____

Did you contribute, convert or withdraw a pension plan or IRA (Roth/Traditional)? _____

Did you put money into a Nebraska college or ABLE savings plan? _____

Did you pay any college tuition or pay interest on a student loan? _____

(In order to take education credit we must see a Summary account from the College).

Did you give a gift of more than \$14,000 to one or more people? _____

Did you transfer a home from a parent to a child or other person? _____

Did you have a Health Savings Account? _____

Did you have qualified Health Insurance for all 12 months? (Form 1095) _____

Did you receive any 1099-K's (income from paypal/google/internet) or 1099-Misc (prizes/awards)? _____

Did you refinance your home loan, equity loan or pay any real estate taxes? _____

Did you sell/purchase your home (or plan to), land or other personal property? _____

Did you own any rental property? _____

Did you own any interest in a partnership; start or dispose of a business this year? _____

Is there any other income to report on your return? Income from another state? _____

Did you live, work own real estate in a foreign country; receive benefits or gifts from foreign sources? _____

Do you plan on applying for Social Security in 2017? _____

Have you been a victim of Identity Theft? _____

Did you receive any correspondence from the IRS or NE Dept. of Rev? _____

Would you like to direct deposit your refund or direct withdraw if a balance is due? _____

Put an X by any items that pertain to you or your spouse:

Alimony ___ Scholarships ___ Grants ___ Savings Bonds ___ Jury Duty ___ Unemployment ___

Compensation ___ Prizes ___ Bonuses ___ Awards ___ Gambling Winnings ___ Unreported Tips

___ Commissions ___ Worker's Compensation ___ Disability ___ Veteran's Pension ___ Installment

Sale Payments ___ State Tax Refund ___