

## ***CLIENT QUESTIONNAIRE for TAX YEAR 2017***

**NAME** \_\_\_\_\_ **PHONE** \_\_\_\_\_ **DATE** \_\_\_\_\_  
**EMAIL** \_\_\_\_\_

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

Can you be claimed as a dependant by another taxpayer?	Yes	No
Were there any Births, Deaths, Divorces, Marriages or Adoptions in 2017?	Yes	No
Did you provide a home for or help support another person?	Yes	No
Do you have any disabled children under the age of 21?	Yes	No
Do you have any <i>Consumer Use Tax</i> to report for 2017? (Internet purchases)	Yes	No
Did you make estimated tax payments?	Yes	No
Did you file Bankruptcy/Canceled Debt or modify a loan?	Yes	No
Did you withdraw from a mutual fund or sell a stock?	Yes	No
Did you contribute, convert or withdraw a pension plan or IRA (Roth/Traditional)?	Yes	No
Did you put money into a Nebraska college or ABLE savings plan?	Yes	No
Did you pay any college tuition or pay interest on a student loan?	Yes	No
(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?	Yes	No
Did you transfer a home from a parent to a child or other person?	Yes	No
Did you have a Health Savings Account?	Yes	No
Did you have qualified Health Insurance for all 12 months? (Form 1095)	Yes	No
Did you receive any 1099-K's (income from paypal/google/internet) or 1099-Misc (prizes/awards)?	Yes	No
Did you refinance your home loan, equity loan or pay any real estate taxes?	Yes	No
Did you sell/purchase your home (or plan to), land or other personal property?	Yes	No
Did you own any rental property?	Yes	No
Did you own any interest in a partnership; start or dispose of a business this year?	Yes	No
Is there any other income to report on your return? Income from another state?	Yes	No
Did you live, work own real estate in a foreign country; receive benefits or gifts from foreign sources?	Yes	No
Do you plan on applying for Social Security in 2018?	Yes	No
Have you been a victim of Identity Theft?	Yes	No
Did you receive any correspondence from the IRS or NE Dept. of Rev?	Yes	No
Would you like to direct deposit your refund or direct withdraw if a balance is due?	Yes	No

**CIRCLE** 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.