

ITEMS THAT MAY AFFECT YOUR TAX RETURN: Page 1

Most of these answers will be "No". For any question that you answer "Yes", I will need more information.

About Yourself

___ **Yes, or** ___ **No:** Did your marital status change?

___ **Yes, or** ___ **No:** Can you or spouse be claimed as a dependent by someone else? Are you?

___ **Yes, or** ___ **No:** Are you or your spouse legally blind?

___ **Yes, or** ___ **No:** Has your spouse died in the last three years?

___ **Yes, or** ___ **No:** Were you a student? If so, were you a full time student?

___ **Yes, or** ___ **No:** Were you or your spouse a member of the U.S. Armed Forces?

___ **Yes, or** ___ **No:** Were you or your spouse in the military for 20+ years or has total/permanent disability from service?

___ **Yes, or** ___ **No:** Are you or your spouse retired on full time disability?

___ **Yes, or** ___ **No:** Will you or your spouse retire next year?

___ **Yes, or** ___ **No:** Did you receive any notices or correspondence from the IRS or state agency?

___ **Yes, or** ___ **No:** Did you discover any changes that would require amending a prior year's tax return?

___ **Yes, or** ___ **No:** Do you want to donate \$3 to the Federal Presidential Campaign? This will NOT increase your tax due or decrease your refund.

___ **Yes, or** ___ **No:** Do you want to donate \$5 to the State Election Campaign Fund? This will NOT increase your tax due or decrease your refund.

___ **Yes, or** ___ **No:** Do you want to donate to the MN nongame wildlife fund? This WILL increase your tax due or decrease your refund. Amount _____

___ **Yes, or** ___ **No:** Do you want me to file a State "Use Tax" Return for you? According to Minnesota Law, you owe "Use Tax" when Minnesota sales tax is NOT charged on taxable items you buy, whether you buy them in Minnesota, or outside the state. ALL such BUSINESS purchases are subject to "Use Tax", and PERSONAL purchases are subject to "Use Tax" if annual purchases are OVER \$770.

Business Purchases:\$_____ **Personal Purchases:\$**_____

About Your Dependents

___ **Yes, or** ___ **No:** Did you have any additional dependents or changes in who you can claim as a dependent?

___ **Yes, or** ___ **No:** Do you have any dependents that are required to file a tax return?

___ **Yes, or** ___ **No:** Do you have any children that age 19 (or a full time student under age 24) with "unearned income" over \$350? Most income that is not from a job or self employment is "unearned income". This includes scholarships that are not used for tuition.

___ **Yes, or** ___ **No:** Are any of your dependents **not** U.S. citizens or residents?

___ **Yes, or** ___ **No:** Did you provide over half of the support for anybody else during the year?

___ **Yes, or** ___ **No:** Did you pay any expenses related to the adoption of an eligible child?

___ **Yes, or** ___ **No:** Did you pay for childcare so that you could work or go to school full time?

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For any question that you answer "Yes", I will need more information.

About Your Income and Assets

- Yes, or** **No:** Does any of your Mortgage Debt include money that was **not** used to purchase or substantially improve your home? If so, how much?
- Yes, or** **No:** Do you have any income from States outside of Minnesota?
- Yes, or** **No:** Did you sell any stock or bonds not reported on a 1099-B?
- Yes, or** **No:** Did you sell any U.S. Savings Bonds?
- Yes, or** **No:** Did you receive any disability payments?
- Yes, or** **No:** Did you receive any unreported tip income?
- Yes, or** **No:** Did you buy, sell, or abandon a home?
- Yes, or** **No:** Did you incur a loss because of damaged or stolen property?
- Yes, or** **No:** Did anyone owe you money which had become uncollectable?
- Yes, or** **No:** Did you have any debts canceled or forgiven by a lender?
- Yes, or** **No:** Did you earn any foreign income, interest, dividends or have any foreign taxes paid?
- Yes, or** **No:** At **any** time during the year, did you have any foreign bank accounts?
- Yes, or** **No:** At **any** time during the year, did you have signature authority over foreign bank accounts that total over \$10,000?
- Yes, or** **No:** At **any** time during the year, did you have foreign assets valued at over \$50,000?
- Yes, or** **No:** Did you receive any payments or distribution from a pension, IRA, or other retirement plan?
- Yes, or** **No:** Did you "roll over", "convert", or "recharacterize" any retirement accounts?
- Yes, or** **No:** Did you contribute to a Coverdell Educational Saving Account or "529 Plan"?
- Yes, or** **No:** Did you receive any distributions from a Coverdell Educational Saving Accounts or "529 Plan"?
- Yes, or** **No:** Did you receive welfare, including MFIP (Minnesota Family Investment Program), MSA (Minnesota Supplemental Aid), SSI (Supplemental Security Income), GA (General Assistance) and GRH (Group Residential Housing)?

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For any question that you answer "Yes", I will need more information.

Miscellaneous

- Yes, or** **No:** Did you make any energy efficient improvements to your home?
- Yes, or** **No:** Did you pay mortgage insurance premiums, or pay a VA funding fee that is not reported on a Form 1098?
- Yes, or** **No:** Did you purchase a motor vehicle or a boat? If so, how much sales tax did you pay for those items?
- Yes, or** **No:** Did you purchase a plug-in vehicle or alternative fuel vehicle?
- Yes, or** **No:** Did you make gifts of over \$14,000 to any one individual or trust?
- Yes, or** **No:** Have you loaned anybody money, that they may be paying you interest?
- Yes, or** **No:** Did you employ household help? Household help may include nannies, tutors, housekeepers, gardeners, companions, etc. If they were paid at least \$2000 for the year, you **must** report the earnings and file the **W-2s and related payroll tax returns**.
- Yes, or** **No:** Did you pay anyone \$600 or more for services performed in the course of business? You must send THEM 1099s ASAP. This includes attorneys, part-time help, landlords, and commissions paid. If you want me to prepare the 1099s, you must get me the information **immediately**.
- Yes, or** **No:** Did you own any rental real estate?
- Yes, or** **No:** Did you pay any interest on Student Loans for yourself or a dependent?
- Yes, or** **No:** Not including you or your spouse, do any other adults live in your home?
- Yes, or** **No:** Would you like Direct Deposit? If yes: (a) What is your bank's name? (b) What is your bank's routing number? (c) What is your bank account number? (d) Is this a Checking Account or Savings Account?

Health Insurance

- Yes, or** **No:** Did you or your dependents go **without** health coverage at any time during the year?
- Yes, or** **No:** If you did not have health insurance for at least part of the year, do you know if you qualify for any exemptions or hardships? <https://www.healthcare.gov/fees-exemptions/exemptions-from-the-fee/>
- Yes, or** **No:** Did you contribute to, or receive distributions from, a Health Savings Account (HSA)?

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By signing this, I indicate that I have read **ALL FOUR PAGES** (including this page) and checked "Yes" or "No" for **ALL** questions and have answered them to the best of my knowledge:

This confirms that all the data given to me in any form, including information on notes, attachments, additional worksheets and schedules, are true to the best of my (our) knowledge.

I/we have supporting records for mileage, business expenses, charitable contributions, as well as all other expenses claimed.

All W-2's and 1099s are reported. They are correct and complete, except as noted. (If there are errors, please provide an explanation if the 1099s are wrong.) Income from all sources, domestic (USA) and worldwide, has been reported. All income received in cash or via barter or trades has been reported.

Earned Income Credit (EIC) - if you are eligible for the EIC, you certify the following: The child(ren) in question is (are) your legal dependent(s). You are not filing a fraudulent Head of Household return while you are married. Your child(ren) is (are) legal resident(s) of the United States and have resided with you for over 6 months in 2015. Nobody else is claiming you as a dependent.

Print your name

Spouse's printed name

Your Signature

Spouse's Signature

Date

Date