

# 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:** Have you had a spouse die within the last three years?
- ☐ **Yes, or** ☐ **No:** Does anybody in your home go to college? If so, are they considered 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 (besides your children)?
- ☐ **Yes, or** ☐ **No:** Did adopt, or 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? This includes day camps and any other circumstance that the primary purpose of the activity was to watch your child.

## ITEMS THAT MAY AFFECT YOUR TAX RETURN: Page 2

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 (or outside of your home State)?
- \_\_\_ **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 college savings plan (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)?
- \_\_\_ **Yes, or** \_\_\_ **No:** At any time during the year, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? That can include thing like **Bitcoin, NFTs**, etc.)?

## ITEMS THAT MAY AFFECT YOUR TAX RETURN: Page 3

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? That includes things like a furnace, air conditioner, heat pump, biomass stove, windows, doors, insulation, air sealing, and a home energy audit.
- \_\_\_ **Yes, or** \_\_\_ **No:** Did you install specialized energy property, such as solar, geothermal, fuel cells, battery storage, etc.?
- \_\_\_ **Yes, or** \_\_\_ **No:** Did you purchase a plug-in electric vehicle?
- \_\_\_ **Yes, or** \_\_\_ **No:** Did you install an electric charger for a plug-in electric vehicle?
- \_\_\_ **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 \$17,000 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 \$2600 for the year (or in some cases, less), 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:** Did you have a 'stillbirth' of a child during the year?
- \_\_\_ **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 have health insurance through MNSure that was NOT "Medical Assistance" or "MinnesotaCare, and received a year-end Form 1095-A?
- \_\_\_ **Yes, or** \_\_\_ **No:** Did you contribute to, or receive distributions from, a Health Savings Account (HSA)?

## ITEMS THAT MAY AFFECT YOUR TAX RETURN: Page 4

\_\_\_\_\_ Did you receive the "Minnesota Direct Tax Rebate" of \$260.00 per person? That is the special payment from the State based on your 2021 tax return..

\_\_\_\_\_ If so, what was the total amount? You should have received a Form 1099-MISC from the State of Minnesota.

\_\_\_\_\_ Did you make any charitable contributions in cash, check or credit card? If so, how much did you contribute?

\_\_\_\_\_ Did you make any charitable contributions in property (such as donating to Goodwill)? If so, how much did you contribute?

\_\_\_\_\_ Did you have any charitable out-of-pocket costs (for example, stamps for mailing charitable items, etc.)? Did you have any charitable mileage (for example, driving for charitable purposes for a charitable organization)? If so, please give details.

\* You must keep records of the charitable contribution, such as a receipt, cancelled check, etc.\

\*\* Charitable donations of \$250 or more in one day require a receipt with details and states that no goods or services were received\*\*

\*\*\* If your total annual 'property' donations are over \$500, much more detail is required, including the date and location of each donation\*\*\*

\_\_\_\_\_ For direct deposit, is your bank account the same as last year? If your answer is "no" or if you are unsure, give me (a) routing number, (b) account number, and (c) if it is a checking or savings account.

\_\_\_ Yes, or \_\_\_ No: Do you have an LLC (Limited Liability Company) or a Corporation?

## ITEMS THAT MAY AFFECT YOUR TAX RETURN: Page 5

By signing this, I indicate that I have read **ALL FIVE 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 during the year. Nobody else is claiming you as a dependent.

I understand this agreement is only for preparation of the federal and state income tax returns. Additional work may need more information and may result in additional preparation fees.

\_\_\_\_\_  
Print your name

\_\_\_\_\_  
Spouse's printed name

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date