Your Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **TY2014**

Daytime Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Evening Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dear Taxpayer,

The goal of this questionnaire is to help me understanding your tax situation better so I can file your tax return accurately and expeditiously.

* Bring a copy of your 2013 Tax Return (or the last tax return you have) if I didn’t prepare it for you.
* List all your full-time and part-time occupations
* Make copies of all W-2s and tax forms, if possible
* This is clickable form. Feel free to save it and email it to me.

**Section 1 – About Yourself**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Primary Taxpayer | Spouse | PREPARER’SNOTES |
| Name of the primary tax payer if filing jointly with spouse. |  | N/A |  |
| Has IRS validated you as identity theft victim and you received CPO1A letter? | Yes  No  If yes, please provide your Identity Protection PIN | Yes  No  If yes, please provide your Identity Protection PIN |  |
| Date of Birth (MM/DD/YY) |  |  |  |
| Occupation |  |  |  |
| Were you a member of clergy who filed Form 4361? | Yes  No | Yes  No |  |
| Are you a U.S. citizen or Permanent Resident (i.e. Green Card holder?) | Yes  No | Yes  No |  |
| Which U.S. state were you a resident of as of Dec 31, 2014? |  |  |  |
| Were you a resident of the abovementioned U.S. state for the entire year of 2014? | You  Yes  No | Spouse  Yes  No |  |
| Do you want to contribute $3 to Presidential Election Campaign? “Yes” will not change your tax and reduce your refund. | Yes  No | Yes  No |  |
| Your current address |  | |  |
| Were you legally married as of 12/31/2014? | Yes  No | |  |
| If you were legally married as of 12/31/2014, were you separated from your spouse? | Yes, I was separated for \_\_\_\_ months in 2014.  No, I was not separated | |  |
| Is someone else claiming you as dependent for 2014? | Yes, someone is claiming me as dependent.  Who? \_\_\_\_\_\_\_\_\_\_\_  Relationship \_\_\_\_\_\_\_\_\_\_\_\_\_  No, no one is claiming me. | |  |
| Was there anyone living with you in 2014 beside your spouse, if any? | Yes, someone lived with me in 2014  Please fill out the following table for each dependent.  No, I/ We lived alone all year in 2014 | |  |
| Note: Do not enter spouse as dependent.   |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | Name | DOB (mm/dd/yy) | Married? (Y/N) | US Citizen/ Resident? (Y/N) | Full time student? (Y/N) | SSN | Relationship to you | Lived with you more than half of the year (Y/N) | Dependent provided >50% of his/ her OWN Support? (Y/N) | Dependent earned >$3,950? (Y/N) | |  |  |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  |  |  |   Attach additional sheet if you have more than 3 dependents. | | | |

**Section 2 – Income**

|  |  |  |
| --- | --- | --- |
|  |  | PREPARER’SNOTES |
| Did you have any Foreign Earned Income in 2014? Do not count interest, capital gain from foreign stocks. | Yes  No |  |
| Did you have any bank account in the USA? | Yes  No Bring all 1099-INT  * Bring a voided check if you want direct deposit |  |
| Did you have any foreign bank account? | Yes  No |  |
| If you had any foreign bank account, was the total value US$50,000 or less on 12/31/2014 AND the total value was less than US$75,000 at any time during the tax year | Yes  No |  |
| Did you receive dividends from stock? | Yes  No Bring all 1099-DIV |  |
| If you have children, did they receive any investment income? | Yes  No Bring all 1099s |  |
| Did you receive alimony (NOT child support) in 2014? | Yes  No Bring documentation that shows how much alimony you have received in 2014 |  |
| Did you pay alimony (NOT child support) in 2014? | Yes  No  Make sure you have the name and SSN of the recipient. |  |
| Did you receive any combat pay in 2014? | Yes  No |  |
| Did you run your own business in 2014, or did you receive 1099-MISC?  Feel free to use <http://www.NoPainMuchGain.com/spreadsheet.xls> to keep track of revenue and expenses to avoid $100/hr organization fee. | Yes  No Bring documentation of revenue, amount and type of expense.Bring documentation of how much you paid for health insurance premium in 2014 for yourself, spouse and dependents. |  |
| Did you buy or sell any property such as stock, bonds and mutual funds in 2014? | Yes  No Bring all 1099-BKnow when did you buy those properties and the purchase prices |  |
| Did you lose more than $3,000 in any one year in stocks, bonds and mutual funds in the past few years? | Yes/ Not Sure  No Bring Schedule D from previous tax returns |  |
| Did you sell your home in 2014?  Feel free to use <http://www.NoPainMuchGain.com/rental.xls> to keep track of revenue and expenses to avoid $100/hr organization fee. | Yes  No Bring 1099-S, if any  * Know when did you buy your home and at what price * Check the escrow paper from the title company to see if you have paid any prorated real estate tax * Was the home a rental property?  **Yes  No** * **Was the home purchased with First Time Homebuyer Credit?  Yes  No** |  |
| Was your home foreclosed by the bank in 2014? | Yes  No Bring 1099-A or 1099-C issued by the bank  * Your cost of the home including remodeling and upgrade. |  |
| Did you receive rental income in 2014, whether the rental unit has permit or not?  Feel free to use <http://www.NoPainMuchGain.com/rental.xls> for each rental property to keep track of revenue and expenses to avoid $100/hr organization fee. | Yes  No Know how much was your annual rental incomeKnow how big is your home and how big is your rentalKnow how much you paid to maintain the house, such as property tax, home insurance...etc.Find out from your property tax statement on the assessed value of the home excluding land valueFind out when (mm/yy) you bought the rental property and how many months was it available for rent. |  |
| Did you receive unemployment compensation in 2014? | Yes  No Bring all your 1099-G |  |
| Did you withdraw money from your 401k, 403b or IRA accounts in 2014? | Yes  No Bring all your 1099-R |  |
| Did you receive Social Security in 2014? | Yes  No  Bring your Form SSA-1099, or RRB-1099 or SSA-1042S, or RRB-1042S |  |
| Did you win any lottery, raffle and gambling? Did you receive compensation for jury duty? | Yes  No  Bring 1099-G, if you have any |  |
| Did you receive any inheritance or gift from outside of the USA? | Yes  No |  |

**Section 3 – Adjustment to Income**

|  |  |  |  |
| --- | --- | --- | --- |
|  | You | Spouse | PREPARER’SNOTES |
| Did you contribute to Heathcare Savings Account (HSA) for High Deductible Health Plan (HDHP) in 2014 Or are you planning to contribute before 4/15/2015?  **Note: Not to be confused with Flexible Spending Account (FSA).** | Yes  No | Yes  No |  |
| Did you contribute to any IRA, SEP and/or SIMPLE in 2014? Or are you planning to do so before 4/15/2015? | Yes  No  Which, When and How much? | Yes  No  Which, When and How much? |  |
| Did you pay any student loan interest in 2014? | Yes  No  Bring 1098-T | Yes  No  Bring 1098-T |  |
| Did you, your spouse or dependent pay any post-secondary tuition or job-improving training in 2014? | Yes  No  Bring any 1099-T. Know how much for each recipient if you did not receive 1099-T | |  |
| Did you relocate in 2014 for job reason? | Yes  No | |  |

**Section 4 – Possible Deduction**

|  |  |  |
| --- | --- | --- |
|  |  | PREPARER’SNOTES |
| Did you pay any State tax in 2014 for TY2013 and prior? | Yes  No  How much? |  |
| Did you pay any out-of-pocket medical expense, such as health insurance, doctor offices co-pay, dental work, prescription glasses (contacts), prescription medication, prescribed birth control pills…etc.? | Yes  No  How much and what were they for?  How many miles were driven on your car to obtain medical services? |  |
| Did you pay any mortgage interest in 2014?  Tip: Find out how much CA DMV Vehicle License Fee at <https://www.dmv.ca.gov/FeeCalculatorWeb/vlfForm.do> | Yes  No   * Know how much you paid for property taxes AND DMV Vehicle License Fee * Bring all 1098s including those from home equity * Identify each 1098s with property address, original loan amount and type (i.e. home or equity line of credit) |  |
| Did you refinance your home in 2014? | Yes  No  Please provide the Escrow closing statement that list all the costs you paid to purchase your home |  |
| Did you donate any cash (stocks, mutual funds …etc) and mileages to any charity, such as religious organization and any non-profit organization (such as KQED radio, UNICEF and Goodwill...etc.), AND you have kept the record (such as a canceled check, a bank copy of a canceled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity? | Yes  No  How much, in what form and who was/were the recipient(s)?  How many miles were driven on your car to perform volunteer work? |  |
| If you donated money to charity, did you give cash instead of check? | Yes, I gave cash but I don’t have acknowledgement letters or receipts from all beneficiaries.  Yes, I gave cash and I have acknowledgment letters or receipts from all beneficiaries.  No, I did not give cash. |  |
| If you donated money to charity, was any one single donation $250 or more? | No, I don’t have all the acknowledgement letters or receipts for any single donation that was $250 or more.  Yes, I have all the acknowledgement letters or receipts for any single donation that was $250 or more. |  |
| Did you donate vehicle, boat and aircraft to any religious or non-profit organization? | Yes  No |  |
| Were you involved with discrimination suit, or with a lawsuit related to doing or keeping your job? | Yes  No |  |
| Did you suffer any loss from casualty or theft? | Yes  No  How much and what are they for? |  |
| Did you incur any unreimbursed employee expense? | Yes  No  How much and what are they for? |  |
| Did you subscribe to any professional service for your investment (such as magazine and research service)? | Yes  No  How much and what are they for? |  |

**Section 5 – Credits**

|  |  |  |
| --- | --- | --- |
| Did you pay for any childcare expense, including pre-schools and K but excluding 1st grade or higher? | Yes  No How much did you pay for each childTry your best to obtain the name, address and Taxpayer Identification Number for each child’s care provider or a W-10 from each provider, unless provider is a tax-exempt organization. |  |
| Did you adopt or in process of adopting a child or children in 2014? | Yes  No |  |
| Did you make energy efficiency improvement to your home in 2014, such as adding insulation, energy efficient exterior windows and energy-efficient heating and air conditioning systems? | Yes  No |  |
| Did you purchase any energy efficiency residential alternative energy equipment, such as solar hot water heaters, geothermal heat pumps and wind turbines in 2014? | Yes  No |  |
| Did you purchase a qualified plug-in electric drive motor vehicle in 2014? | Yes  No  Please state the Year/ Make/ Model of the vehicle. |  |

**Section 6 – Other Federal/ State Taxes**

|  |  |  |
| --- | --- | --- |
| Did you make any purchase from out-of-state or Internet sellers in 2014, where:   1. The seller(s) did not collect state sales tax, AND 2. You used, stored, gave away or consumed the item in your state, AND 3. Your state is not Alaska, Delaware, Montana, New Hampshire and Oregon? | Yes  No  You may owe [Use Tax](http://www.ftb.ca.gov/current/usetax.html) for your State. I will contact you for more information. |  |
| Did you pay more than $1,800 salary to household employee(s) in 2014? | Yes  No |  |
| Would you like to make voluntary contribution to any charitable fund offered by your state, if offered? | Yes  No |  |
| Did you make any Estimated Tax Payment (Federal and/or State) in 2014? | Yes  No  When and how much did you pay? |  |
| Was everyone in your household (spouse and dependents, if applicable) covered by one of the following “minimum essential” health plan in each month of the year?   * Govt-sponsored (Medicare Part A, Part C, Medicare Advantage, Medicaid, CHIP, TRICARE, veteran health coverage) * Employer-sponsored coverage under a group health plan, including self-insured plans. * Qualified individual market coverage purchased through the Marketplace or from insurance companies.   If you don’t see your health plan here, check <http://tinyurl.com/na4fbng> for full listing. | Yes, everyone in my household was covered by a minimum essential health plan in each month of the year, and the plan was obtained from the Marketplace.  Yes, everyone in my household was covered by a minimum essential health plan in each month of the year, and the plan was NOT obtained from the Marketplace.  No, not everyone in my household was covered by a minimum essential health plan in each month of the year. |  |

**Section 7 – Conclusion**

|  |  |  |  |
| --- | --- | --- | --- |
| Would you want to file the Federal and State return electronically (i.e. e-File)? E-file eliminates the needs to mail in paper returns with attachments and you will receive your refund faster, if any. | Yes  No | |  |
| If you have refund, do you want the IRS/ State to direct deposit your bank account? | Yes  Bank Routing# is:  Checking Account# is: | No  I know it is going to take longer but I still want to receive refund checks in the mail. |  |
| If you owe tax, do you want to the IRS/State to debit your bank account? | Yes  Bank Routing# is:  Checking Account# is: | No  I prefer to mail the check(s) in. |  |
| If you owe federal tax, do you need to arrange Installment Agreement? | Yes, I’d be interested in Installment Agreement if I owe Federal more than $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
| How did you learn about my tax service? | I am a returning client  Craigslists  Yelp  Friends/ Relatives. Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Others. Please specify \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
| What is the most important factor that helps you decide to use my tax service over others? |  | |  |

**Please use the space below to provide any information, if any, that you believe is significant but I haven’t asked you. Use additional paper if necessary.**

|  |
| --- |
|  |

**\*\*\*\*\* Please complete and return this Questionnaire with the Disclosure and Agreement form \*\*\*\*\***