

Personal Questionnaire

The key to good representation is a thorough understanding of your personal situation. Some of these questions may seem very personal, but they are all necessary.

Today's Date: _____/_____/_____
Name (Taxpayer and Spouse): _____
Birthdate - Taxpayer: Spouse: _____
Address, City, State, Zip: _____
How long at this address: _____ Yrs _____ Mths
Home Phone: _____ - _____ - _____
Work Phone-Taxpayer: Spouse: _____ - _____ - _____
Cell Phone: _____ - _____ - _____
E-mail: _____@_____.

1. Who prepared your return? _____
2. Did you pay someone to prepare your return? _____
3. What service does accountant perform? _____
4. How long has this person/firm prepared your return? What records did you supply? _____ Yrs
5. Was an amended return filed? _____
6. Are you or your spouse blind or 65? _____
7. Did you receive any IRS notices regarding this tax return prior to the audit notice? _____
8. Have you had any prior year audits? If so, what year(s)? _____
9. Are you required to file any other tax returns? _____
10. Have you filed all tax returns including the current year's tax return? _____
11. Are there any changes or additions to your return since filed? (Any known errors or omissions) _____
12. If yes, did you discover any income items not included or possible deductions? _____
13. To the best of your knowledge, was all income reported? _____
14. If married, when did you marry? _____
15. Did you pay any household help or other employees? _____

16. Income Sources:

Interest	x	Child support	x	Welfare	x
Dividends		Prizes, awards		Unemployment	
Sale of Assets		Bonuses		VA Benefits	
Other Jobs		Gambling/Lotteries		Military allowance	
Investments		Insurance		Foreign Bank Accounts	
Tips		Estate/Trusts		Pensions	
Commission		State Tax Refund		Annuities	
Hobbies		Employer Reimbursement		Profit Sharing	
Rent/Royalty		Gifts, Inheritance		IRA/Keogh Distributions	
Alimony		Scholarships, Fellowships, Grants		Stocks	
Partnerships		Loans		Foreign Income, Investments or Transactions	
Sick Pay		Social Security		Other	

If income was received but not reported on your tax return please explain:

17. Do you belong to any bartering clubs or organizations? If so please explain.

18. Exemptions:

Name	Age	Birth Date	Relationship	Place of Residence	Occupation

19. Other Children, regardless of age (not claimed on tax return):

Name	Age	Birth Date	Relationship	Place of Residence	Occupation

20. Do the children noted in 18 and 19 above attend public or private school? Please specify:

21. Do any of your dependents/children have disabilities? Please specify:

22. Please list all former spouses and dates of marriage and divorce: _____

23. Do you pay alimony or child support? _____

24. Describe your current job and name of employer.

Taxpayer Employer Name	Job Description	How long?	Annual Salary
Spouse Employer Name	Job Description	How long?	Annual Salary

25. How are you paid? How Often _____

26. Please tell us about your hobbies, pets and other interests.

27. Do you have any income/expense producing hobbies? _____

28. Please list and describe all of your vehicles:

29. Do you own your current residence? If yes, when did you purchase it, what was the purchase price and down payment? What kind of mortgages do you have? What are the monthly payments?

30. How was the down payment paid? Cash or check? _____

31. What was the beginning and ending mortgage balance of the year under audit? What was the mortgage payment and property taxes for that year? _____

32. Do you have any other real estate? _____

33. Did you have any financial investments or own property in any foreign city in the nature of:

a. Bank accounts? If so, what is the bank name, account number and average balance? _____

b. Securities? _____

c. Investments in corporations, partnerships, trust accounts or other assets? _____

34. Do you have any other loans? (auto, installments?) Do you have credit card payments? What are the monthly payments?

35. Did you refinance your mortgage loan in (Audit Year)? _____

36. Did you have any property settlements? _____

37. Do you own stock? Did you sell any stock?

38. Did you make any other major purchases in this tax year? (Car, boat, furniture, etc.)

39. What is your educational background?

40. Where do you maintain your personal bank accounts –Name of financial institution and address:

41. Do you have a PayPal account? If so, do you use it for more than paying bills?

42. Generally how much cash do you have on hand (not cash that is in the bank, but cash that you actually carry with you or keep at home)? _____

