

2016	1040	US	Miscellaneous Questions
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Please complete this prior to your 2016 tax appointment.

How do you want your tax return? ___ Paper ___ Electronic ___ Both

PERSONAL INFORMATION

Yes No

- Did your marital status or address change during the year?
- Could you be claimed as a dependent on another person's tax return for 2016?

DEPENDENTS

- Were there any changes in dependents?
- Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2016?
- Did you have any children under age 19 or full-time students under age 24 at the end of 2016, with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900?

HEALTH CARE COVERAGE

- Did you and your dependents have healthcare coverage for the full-year?
- Did you receive any of the following IRS Documents? Form **1095-A** (Health Insurance Marketplace Statement), **1095-B** (Health Coverage) or Form **1095-C** (Employer Provided Health Insurance Offer and Coverage)
- If you or your dependents did not have health care coverage during the year, do you fall into one of the following exemption categories: Indian tribe membership, health sharing ministry membership, religious sect membership, incarceration, exempt non-citizen or economic hardship? If you received an exemption certificate, please attach.
- Were you (or your spouse) the beneficiary of COBRA premium assistance for any month during 2016?
- Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

INCOME

- Did you receive unreported tip income of \$20 or more in any month?

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Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?

Did you receive any disability income?

Did you have any foreign income or pay any foreign taxes?

PURCHASES, SALES AND DEBT

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

Did you buy or sell any stocks, bonds or other investment property in 2016?

Did you sell any dividend generating stocks or mutual funds in the first 60 days of 2017?

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

Did you purchase a home in 2016 and you were overseas on official extended duty?

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

Did you have any debts cancelled or forgiven? Or, does anyone owe you money which has become uncollectible?

RETIREMENT PLANS

Did you receive a distribution, transfer or rollover from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2016?

EDUCATION

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

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- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

ITEMIZED DEDUCTIONS

- Did you incur a loss because of damaged or stolen property?
- Did you work out of town for part of the year?
- Did you use your car on the job (other than to and from work)?

ESTIMATED TAXES

- Did you apply an overpayment of 2015 taxes to your 2016 estimated tax (instead of being refunded)?
- If you have an overpayment of 2016 taxes, do you want the excess applied to your 2017 estimated tax (instead of being refunded)?
- Do you expect your 2017 taxable income and withholdings to be different from 2016?

MISCELLANEOUS

- May the IRS discuss your tax return with your preparer?
- Did you have an interest in or signature or other authority over a **financial account in a foreign country**, such as a bank account, securities account, or other financial account?
- Did you receive a distribution from, or were you the grantor of, or transferor to, a **foreign trust or did you have an interest in any foreign assets or accounts**?
- Was your home rented out or used for business?
- Did you incur moving expenses due to a change of employment?
- Did you engage the services of any household employees?
- Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
- Did you or your spouse make any gifts to an individual that total more than \$14,000, or any gifts to a trust?