

# 2019 EZ Questionnaire

# Advisor Tax Services

T = Taxpayer S = Spouse

Name (T) \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_/\_\_\_/\_\_\_

Name (S) \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_/\_\_\_/\_\_\_

Birthdate: (T) \_\_\_/\_\_\_/\_\_\_ (S) \_\_\_/\_\_\_/\_\_\_ Occupation: (T) \_\_\_\_\_ (S) \_\_\_\_\_

Phones: home \_\_\_\_\_ work (T) \_\_\_\_\_ work (S) \_\_\_\_\_

Use texting on cell ? Y N cell (T) \_\_\_\_\_ cell (S) \_\_\_\_\_

Email: (T) \_\_\_\_\_ @ \_\_\_\_\_ (S) \_\_\_\_\_ @ \_\_\_\_\_

Mailing address: \_\_\_\_\_

Physical address (if different than mailing): \_\_\_\_\_

Please check Y or N for all items below

- Y N own real estate
- Y N have children or other dependents; if yes, please fill out our dependent questionnaire
- Y N received income reported on forms other than W2, 1099-INT, 1099-G or 1099-SSA
- Y N received self-employment or independent contractor income (may be on 1099-MISC)
- Y N received income in cash for any services provided or items sold
- Y N received income from alimony, jury duty, lawsuits, awards, prizes, scholarships or grants
- Y N received income from rental property or investments such as stocks, bonds or mutual funds
- Y N received a distribution from an IRA, 401k or other retirement plan reported on form 1099-R
- Y N paid college tuition (not loan payments) during the year, either directly or with student loans

If you answered Yes to any of the above you may need to fill out our 2019 Standard Questionnaire

- Y N received cash tips that were not reported to employer; if yes, how much \$ \_\_\_\_\_
- Y N received correspondence in the past year from the IRS or state (other than refunds)
- Y N bought items out of state or over the internet for which you paid no sales tax
- Y N wish to donate to the Nongame Wildlife, Veteran's, Green Up VT or Children's Trust Fund
- Y N have contributed or plan to contribute to a traditional or Roth IRA before 4/15/2019
- Y N contributed to or received a distribution from a Health Savings Account (HSA)
- Y N contributed to retirement plan or flexible spending account (FSA) thru payroll deduction
- Y N paid interest on student loans (reported on form 1098-E)
- Y N made estimated tax payments (federal or state – other than withholding from wages)
- Y N participated in employee stock purchase plan or other stock option plan
- Y N received an inheritance or gift of money or other assets
- Y N received a loan from a relative or friend that you have to pay back

How many of the following tax forms have you received for 2019 ?

- \_\_\_\_\_ W2 (wages) \_\_\_\_\_ 1099-G (unemployment compensation and/or state tax refund)
- \_\_\_\_\_ 1099-INT (interest) \_\_\_\_\_ 1099-DIV or 1099-B (dividends and/or proceeds of security sales)
- \_\_\_\_\_ 1099-R (retirement) \_\_\_\_\_ SSA-1099 (social security or SSDI)
- \_\_\_\_\_ 1098-E (student loan interest)
- \_\_\_\_\_ 1095-A, B or C (health insurance)

Y N have you received any other types of tax forms? If yes, list here \_\_\_\_\_

Y N do you have any tax questions? \_\_\_\_\_