

Client Questionnaire for 2016 Tax Information

Household and Dependent Information:

YES NO

In 2016 how many people resided at your address over 6 months? _____ How many had income in 2016? _____ Is everyone in your household a U.S. Citizen?		
Does anyone in household qualify to be a dependent of someone else? Or Form 8332?		
Since your last tax return, are there additions or subtractions of dependents or spouse?		
Are you or your spouse totally disabled or legally blind?		
Did you pay a daycare provider or use pretax dependent care benefits?		
Did you pay any student loan interest for yourself or dependents?		
Did you have college tuition/expenses for you or your dependents? 1098T required!		
Has anyone in your household attending college been convicted of a felony?		

Income Information:

Did you have foreign bank accounts, foreign income, foreign assets, foreign property or online gaming?		
Did you make any rollovers/withdrawals from any retirement account?		
Did you have any interest, dividend or investment/stock income with 1099s?		
Did you receive any unemployment income, disability or qualified HSA distributions? (please circle)		
Did you cash any U.S. Savings Bonds?		
Did you visit Luckytown this year and win big (gambling income)and have a record of losses?		
Did you receive or pay alimony (not child support)?		
Have you filed bankruptcy, had a foreclosure, or cancellation of debt in 2016?		
Do you pay for long-term care (nursing home) insurance?		
Do you have unreported tip income?		

Itemized Deductions and Miscellaneous:

Did you pay mortgage(s) interest on your residence (form 1098 required!)?		
Did you pay real estate tax and/or personal property tax in 2016?		
Did you have any unreimbursed employee expenses including mileage? (complete p. 6 part A)		
Total out of pocket paid for: medical _____ health insurance _____		
Do you have a receipt(s) from a qualified charity acknowledging your contributions - cash or goods?		
Are you a teacher who has unreimbursed supplies with receipts? Total Amount = \$ _____		
Did you make any quarterly or annual estimated tax payments?		
Do you wish to contribute \$3 to the presidential election campaign fund or to any state trust funds?		
Did you make any energy-efficient improvements in 2016? Energy Audit?		

BUSINESS, RENTAL, FARM: (if marking yes to any question in this section, complete page 6)

Did you start/dispose of a business; acquire new or additional interest in a partnership or S corporation this year?		
Do you have a self employed business, rental property, partnership, LLC, or corporation?		

REFUND and PAYMENT OPTIONS:

I would like my 2016 tax refund(s) direct deposited into my account located in the United States; I am providing a voided check.		
I will pay fees for having my taxes prepared to Norma's Tax Service with cash, check or credit/debit card.		
I would like the fees for having my taxes prepared (by Norma's Tax Service) taken out of my refund. I understand that by choosing this option there is an additional fee for this bank service, and I must complete pages 7, 8, 9 & 10.		
I would like to pay my IRS balance due with my credit card or auto-withdrawal from my account.		
I request my tax return be provided to me by _____ Paper _____ Electronically		

CLIENT SIGNATURE

Phone Number

Turn over for page 2>>>>>>>>